

**Item No. 3(ii)**  
**Halifax Regional Council**  
**August 2, 2011**  
**Committee of the Whole**

**TO:** Mayor Kelly and Members of Halifax Regional Council  
Original signed by 

**SUBMITTED BY:** \_\_\_\_\_  
Richard Butts, Chief Administrative Officer

Original Signed by   
\_\_\_\_\_  
Mike Labrecque, Deputy Chief Administrative Officer, Operations

**DATE:** July 18, 2011

**SUBJECT:** **HRM Stadium Analysis – Phase 1 Final Report**

---

**ORIGIN**

Regional Council meeting of February 8, 2011, Agenda Item No. 10.1.2

**RECOMMENDATION**

It is recommended that Regional Council:

1. Approve in principle the recommended directions outlined in the Final Report – Phase 1 Stadium Analysis: Halifax Stadium – Business Plan (Attachment 2);
2. Direct staff to proceed to Phase 2 Stadium Analysis: Site Selection and Preliminary Design; and
3. Approve an increase to project CBX01363 in the amount of \$275,000 (net HST included) for Phase 2, with funding from the Strategic Growth Reserve, Q126, as outlined in the Budget Implications section of this report.

## **BACKGROUND**

### **Executive Summary**

On February 8, 2011, Regional Council directed staff to proceed with a process to determine whether or not there is viability for the development of a multi-use stadium in the municipality. The analysis would determine the business case for such a facility, along with an assessment of future opportunities, and comparisons of similar facilities. The potential multi-use facility would have a minimum seating capacity (including a mix of temporary and permanent seating) of 20,000 seats.

Regional Council, also at that time, approved a citizen led Steering Committee to oversee and guide the project. The Steering Committee, populated with representatives as directed by Regional Council, has proceeded with their mandate and has submitted its reports and recommendations to Regional Council.

This direction was provided to staff as a result of an opportunity to participate as one of the six Canadian Host Cities for the 2015 FIFA Women's World Cup tournament. The Canadian Soccer Association has expressed its desire to host a coast to coast event, and Halifax requires a stadium in order to qualify as a Host City.

### **Phase 1 Project Cost**

Regional Council approved a project budget of \$100K for Phase 1 work. An RFP was issued and awarded to Sierra Planning and Development for a cost of \$97k. The Province of Nova Scotia agreed to cost share the Phase 1 Analysis and provided a contribution of \$33K.

### **Consultation with Citizens**

Key stakeholder interviews and consultation were completed (17 in total), in addition to three public open house meetings, attended by a combined total of approximately 200 citizens. As well, over thirty sport and non-sport event groups were represented in meetings with the consulting team. All provided feedback related to the topic.

### **Key Aspects of the Analysis Included in the Final Report**

- Profile and Definition of a Regional Economic Engine
- Comparable Stadia in North America
- HRM Stadium Minimum Specifications
- Recreation Trends and Opportunities
- The Opportunities: The Sport and Non-Sport Event Market
- Establishing Principles to Guide Development
- Range of Facility Options
- Locational Criteria
- Assessment of Project Delivery Options
- Assessment of Stadium Operating Revenues and Expenses

- Risk Analysis
- Economic and Social Benefits
- Recommended Directions

## **DISCUSSION**

### **Summary of Key Findings**

1. Current consideration is for a mid-scale multi-use stadium which may be built to house a professional sporting franchise, and also allow for community use.
2. In Canada, there are 15 stadium facilities with seat counts of 10,000 or higher. Recent trends show the development of multi-use capacities beyond single usage for a professional team only.
3. No core professional sport franchise has been identified A professional sporting franchise in Football or Soccer has not been established in Halifax.
4. Support for new and additional facilities has been expressed by a number of sport groups and it is anticipated that, as sport participation continues to grow in the region, most groups will require additional facilities in the near to medium term.
5. Based on illustrative list of events (Exhibit 28), the average event days per year could be in the order of 50 event days per year. Almost all have some degree of spectator capacity however, some are very modest. Major ticketed events are limited – while a number exist annually, these events compete with the rest of Canada, and international locations.
6. A multi-use stadium of 10,000 – 20,000 seats does represent infrastructure to enable the municipality to compete for national and international events which have not historically been given consideration due to lack of hosting infrastructure.
7. Ownership of the proposed facility has been assumed to be municipal, while operations of the facility have been assumed to be contract management. This model is seen as providing the municipality with maximum control over program, access and pricing, while providing for some risk aversion as well.
8. Year-round utilization of the facility has been factored into the operating assumptions in the form of winterized cover for field play. This is seen as a significant revenue draw for the facility.
9. The facility is forecasted to operate with some form of government support.

### **Steering Committee Recommendations and Next Steps**

The Stadium Analysis Steering Committee has recommended that Regional Council consider the advancement of the project to Phase 2 analysis. Phase 2 of the analysis will take place as follows:

A site selection and preliminary design process will be initiated based on a series of criteria developed in Phase 1. These Phase 2 components are critical to the success of the analysis and will allow for a determination of capacity in the region to locate, design and construct a multi-use stadium facility in order to fulfill economic and community goals as identified in Phase 1. Phase 2 will unfold as an open discussion with citizens including a Request for Proposal (RFP)

for potential land and development partnerships, and public opportunities for feedback and comment on design components. The analysis will provide Regional Council with a proposed site (s), facility design concepts, and estimated costs, Class C.

If approved, Phase 2 will be undertaken from September through to December 2011. The estimated cost for Phase 2 is approximately \$275K. A Phase 2 report will be presented to Council in December, 2011.

While the eventual decision may very well be to NOT construct a stadium at this time, Regional Council would benefit from a better understanding of the size, scope, and more detailed costs of stadium options and their viability. It is staff's opinion that proceeding with Phase 2 is a reasonable course of action.

Regional Council may choose, after the conclusion of Phase 2, to consider the analysis complete and NOT proceed at this time to construct a multi-use stadium facility. Alternatively, Regional Council may, after the conclusion of Phase 2, direct staff to proceed to the Phase 3 Construction phase of the project. Phase 2 is essentially a study to better inform future decisions of Council.

### **BUDGET IMPLICATIONS**

If the recommendations are approved, an RFP will be issued for this Phase 2 review with anticipated study period to end in November of 2011.

Funds are currently available in Strategic Growth Reserve Q126 to fund this project.

Any unused reserve funding from phases will carry forward to future phases, if subsequent phases are approved. The budget availability has been confirmed by Financial Services.

#### **Project CBX01363 – Stadium**

Cumulative Unspent Budget	\$ 4,626
Add: Transfer from Q126	<u>\$275,000</u>
Balance	\$279,626

#### **Reserve Account Q126 – Strategic Growth Reserve**

Projected available balance March 31, 2012	\$3,146,425
Less: Phase 2 RFP Cost	<u>(\$ 275,000)</u>
Projected available balance March 31, 2012	<u>\$2,871,425</u>

Cost estimates for Phase 3 Construction will be in the Phase 2 Final Report, and will only be incurred should Council decide to proceed at that time.

### **FINANCIAL MANAGEMENT POLICIES/BUSINESS PLAN**

This report complies with the Municipality's Multi-Year Financial Strategy, the approved Operating budget, policies and procedures regarding withdrawals from the utilization of Operating and Capital reserves, as well as any relevant legislation. If approved, this will increase the withdrawals from Reserves with no net effect to Operating or Project budgets.



## **COMMUNITY ENGAGEMENT**

The proposed Phase 2 analysis will include community and partner engagement. The attached RFP discusses the approach.

## **ALTERNATIVES**

1. Regional Council may choose not to proceed with the recommendations at this time.

## **ATTACHMENTS**

1. Reports Completed from 1986 to 2010 re Stadium
2. Final Report – Phase 1 Stadium Analysis: Halifax Stadium – Business Plan
3. Phase 1 Stadium Analysis: Halifax Stadium Business Plan
4. Phase 1 Stadium Analysis: Public Open House Summary

---

A copy of this report can be obtained online at <http://www.halifax.ca/council/agendasc/agenda.html> then choose the appropriate meeting date, or by contacting the Office of the Municipal Clerk at 490-4210, or Fax 490-4208.

Report Prepared by: Betty Lou Killen Coordinator Client Services Community Development 490.4833

Report Approved by: \_\_\_\_\_  
Doug Rafuse Manager, Service Delivery Community Development 490.6205

Financial Approval by: \_\_\_\_\_  
Bruce Fisher, MPA, CMA, A/Director of Finance/CFO, 490-6308

---

**Attachment 1**  
**Reports Completed from 1986 to 2010 re Stadium**

1. Stadium Proposal researched by Events Halifax, 1999 cited the following proposals to construct a Stadium in HRM:
  - 1994 Halifax Commonwealth Games Bid Committee proposed a stadium as part of their draft bid in 1986
  - 1999 Pan American Bid Committee proposed a stadium as the focal point of their presentation in 1992
  - 1992 City of Halifax presented a draft Mainland North Common Masterplan, which identified a possible location for a stadium in its phase 2 plan. This concept was not incorporated into the final report.
2. Stadium Analysis Report Economics Research Associates, June 2002 was commissioned by Events Halifax
3. Hosting the Commonwealth Games: An Evaluation of the Region's Opportunity, July 2002
4. Outdoor Multi-Purpose Venue Review (Draft) August 2010  
The research outlined in this report is an overview of all of the previous studies.



# Phase 1 Stadium Analysis: Halifax Stadium - Business Plan

Halifax Regional Municipality

---

This page intentionally left blank

## Table of Contents

<b>EXECUTIVE SUMMARY .....</b>	<b>i</b>
<b>1 INTRODUCTION AND PURPOSE.....</b>	<b>1</b>
1.1 OBJECTIVES OF THE EXERCISE .....	2
1.2 EARLIER FEASIBILITY STUDIES .....	3
1.3 WHAT IS NEW ABOUT THIS ASSIGNMENT? .....	4
1.4 2015 FIFA WOMEN’S WORLD CUP OPPORTUNITY AND FACILITY REQUIREMENTS .....	4
1.5 WHAT SCALE OF STADIUM IS HRM CONSIDERING? .....	5
1.6 LIMITATIONS OF THE ANALYSIS .....	5
1.7 OUTLINE OF THE REPORT .....	6
<b>2 PROFILE OF A REGIONAL ECONOMIC ENGINE .....</b>	<b>7</b>
2.1 ECONOMIC OVERVIEW OF HRM .....	8
2.2 POPULATION METRICS – PROVINCIAL.....	12
2.3 POPULATION METRICS – REGIONAL .....	14
<b>3 COMPARABLE STADIA IN NORTH AMERICA .....</b>	<b>21</b>
3.1 WHAT IS A STADIUM? .....	21
3.2 SPECTATOR STADIA CASE STUDY FINDINGS.....	25
3.3 CURRENT STADIUM DEVELOPMENT IN CANADA.....	28
<b>4 HRM STADIUM MINIMUM SPECIFICATIONS .....</b>	<b>37</b>
<b>5 RECREATION, SPORT TRENDS AND OPPORTUNITIES.....</b>	<b>39</b>
5.1 PROFESSIONAL SPORTING FRANCHISE OPPORTUNITIES.....	39
5.2 POPULAR SPORTS IN CANADA .....	41
5.3 A PROFILE OF SOCCER IN NORTH AMERICA.....	42
5.4 OTHER FIELD SPORTS .....	45
<b>6 THE OPPORTUNITIES.....</b>	<b>49</b>
6.1 PARTICIPATORY OPPORTUNITIES AND DAILY PROGRAMMING .....	49
6.2 SPECTATOR AND PARTICIPATORY EVENT OPPORTUNITIES BY SPORT .....	49
6.3 NON-SPORT EVENTS MARKET.....	55
6.3.1 Market Size for Large Scale Entertainment in the Stadium .....	55
6.3.2 Venues for Live Entertainment .....	56
6.3.3 Large Scale Entertainment Product and Audiences for Live Entertainment .....	57
6.3.4 Promoters’ Perspective on Live Entertainment in the Stadium .....	57
6.3.5 Capital Considerations for Large Scale Entertainment in the Stadium.....	58
6.3.6 Recommendations Regarding Large Scale Entertainment in a Potential HRM Stadium.....	58
<b>7 ESTABLISHING PRINCIPLES TO GUIDE DEVELOPMENT.....</b>	<b>60</b>
7.1 INTRODUCTION .....	60
7.2 HRM STRATEGIC POLICY DIRECTIONS .....	60
7.3 GUIDING PRINCIPLES FOR DEVELOPMENT.....	64
<b>8 RANGE OF FACILITY OPTIONS .....</b>	<b>68</b>
8.1 RANGE OF USES VS. SOCCER SPECIFIC.....	68
8.2 WINTER USAGE OPTIONS.....	68
8.3 EXCLUSION OF RUNNING TRACK .....	69
8.4 STAND-ALONE VS. MULTI-FACILITY VENUE .....	69

8.5	GRANDSTAND AND SEATING TYPES .....	70
8.6	RANGE OF STADIUM OPTIONS.....	71
8.7	ALTERNATIVES AND USABLE BUILDING SPACE .....	78
8.8	CAMPUS OPPORTUNITIES.....	82
8.9	PARTNERSHIPS .....	83
8.9.1	<i>Sport Organizations and Institutional Users.....</i>	83
8.9.2	<i>Funding Partnerships.....</i>	83
8.10	FINANCING SOURCES.....	85
<b>9</b>	<b>ASSESSMENT OF PROJECT DELIVERY OPTIONS.....</b>	<b>87</b>
9.1	SOME SPECIFIC CONSIDERATIONS .....	90
9.1.1	<i>Considerations for HRM .....</i>	90
9.1.2	<i>Considerations for Private Sector and Other Proponents.....</i>	90
9.1.3	<i>Assumptions of the Project Delivery, Ownership and Operations Model.....</i>	91
9.2	RESULTING OWNERSHIP/OPERATING MODELS.....	92
<b>10</b>	<b>ASSESSMENT OF STADIUM OPERATING REVENUES AND EXPENSES .....</b>	<b>94</b>
10.1	BASELINE ASSUMPTIONS.....	94
10.2	SCENARIOS CONSIDERED.....	94
10.3	SCENARIO 1: BASE CASE .....	95
10.3.1	<i>Field Revenue Sources .....</i>	95
10.3.2	<i>Building-Related Revenue Base .....</i>	96
10.3.3	<i>Ticketed Events.....</i>	97
10.3.4	<i>Entertainment Events .....</i>	97
10.3.5	<i>Expenses .....</i>	98
10.3.6	<i>Management fee and Capital Reserve .....</i>	98
10.3.7	<i>Cost Savings from Co-Location of HRM Facilities .....</i>	98
10.3.8	<i>Summary of Financial Performance .....</i>	99
10.4	SCENARIO 2 (SENSITIVITY ANALYSIS) .....	99
10.4.1	<i>Revenues .....</i>	100
10.4.2	<i>Expenses .....</i>	101
10.4.3	<i>Summary of Financial Performance .....</i>	101
10.5	RANGE OF DEFICIT .....	102
<b>11</b>	<b>RISK ANALYSIS .....</b>	<b>103</b>
11.1	DEVELOPMENT, DESIGN AND CONSTRUCTION RISKS.....	103
11.2	OPERATING RISKS.....	104
<b>12</b>	<b>ECONOMIC AND SOCIAL BENEFITS .....</b>	<b>105</b>
12.1	ILLUSTRATIVE ECONOMIC IMPACTS OF A POTENTIAL STADIUM IN HRM .....	109
12.2	ECONOMIC IMPACTS OF STADIUM CONSTRUCTION .....	111
12.3	OFF-SITE EVENT SPENDING RELATED IMPACTS.....	113

Appendix A: Summary of Consultation Program and Community Engagement

Appendix B: Socioeconomic Analysis of the HRM Population

Appendix C: Annual Available Events 2015-2025

Appendix D: Entertainment Event Market Analysis and Building Infrastructure Requirements

Appendix E: Locational Criteria

Appendix F: Illustrative Financial Proformas



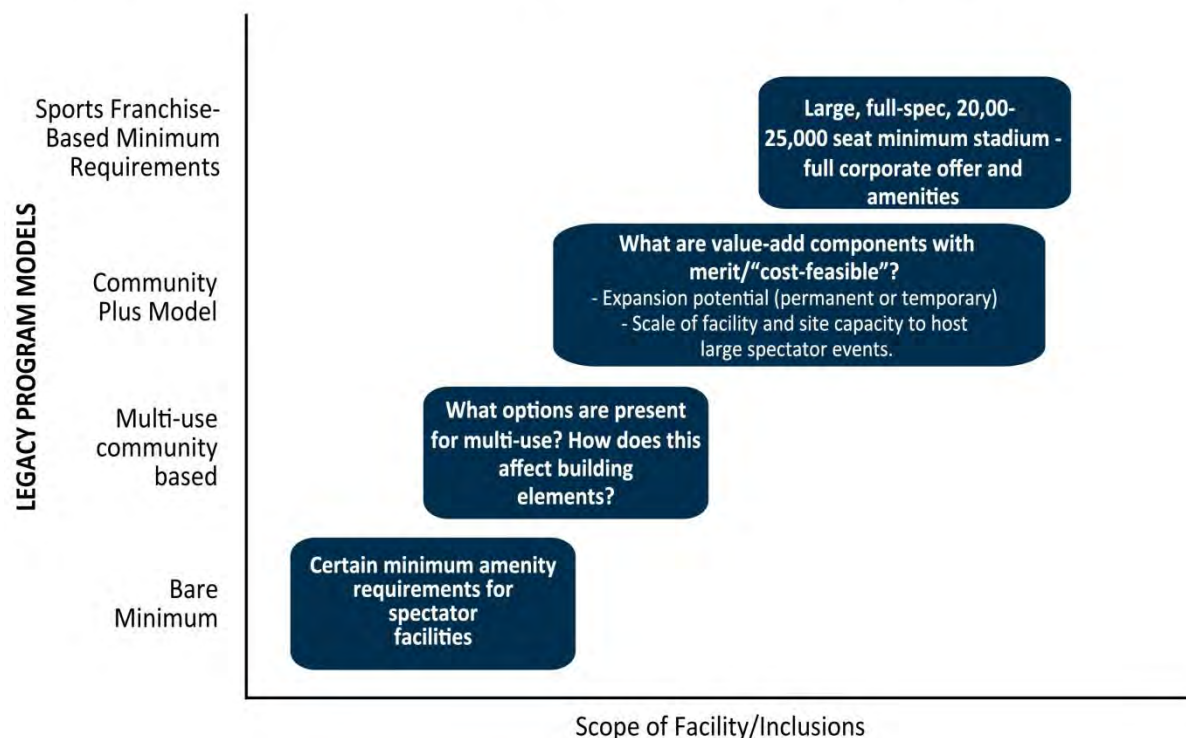
## EXECUTIVE SUMMARY

### Study Objectives

The purpose of the Phase 1 Stadium Consultation and Business Plan is to assess the need, opportunity and financial cost-benefit associated with the development of a sports stadium capable of hosting the FIFA 2015 Women's World Cup. The 2011 Women's World Cup Final held in Germany in June-July was the sixth most watched soccer telecast ever in the United States. However, the 2015 tournament represents only a starting point and is itself only one event among many that a new facility can potentially attract. A key consideration in the business plan analysis is the determination of a sustainable and viable *legacy* which meets not only a demonstrated community need but responds to the opportunity to develop a major event hosting capability in Halifax Regional Municipality (HRM).

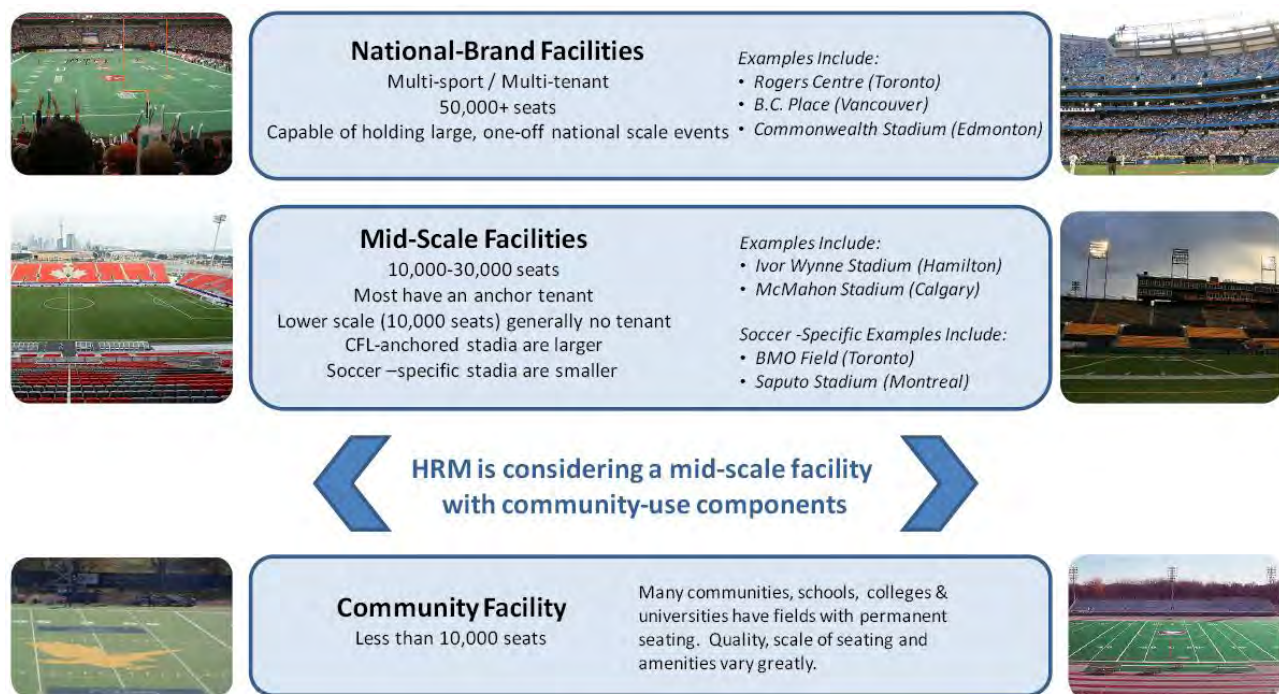
Defining the business concept is at the core of the Phase 1 analysis. While there are a wide range of stadia in Canada, as outlined in this report, Phase 1 is concerned with demonstrated community need, market opportunity and an assessment of the economic impact of the facility. There are a number of questions which arise in any such analysis of legacy opportunities. The report addresses these questions and the merits associated with alternative stadium options, as indicated below.

### Analysis Framework: Testing the Alternate Legacy Opportunities



The result is a preferred option and an assessment of its financial and broader economic (and social) merits to HRM as a whole.

The exhibit below describes the spectrum and scale of Canadian stadia, ranging from National-brand facilities to community facilities:



## Project Process

The study represents Phase 1 of a potential three phase process, with Phase 2 contingent on Council approval of the recommendation of Phase 1 to proceed to Phase 2 (and Phase 3 contingent on similar approval following Phase 2):

1. Phase 1 – Concept definition and justification and high level business plan for facility operations;
2. Phase 2 – Site selection, conceptual design (building program) and capital cost analysis, achieved in part through direct engagement with potential project partners; and
3. Phase 3 – Project Detailed Design and Construction

## What Phase 1 Does Not Include

Phase 1 focuses explicitly on the definition of a viable facility and program which meets the twin objectives of maximizing community access to high quality recreation and creating significant economic development through event hosting at the stadium.

Phase 1 excludes:

- The consideration of facility design specifics;
- The consideration of site location for the stadium; and
- Specific details of prospective partnerships with organizations which are more appropriately addressed as part of the detailed Phase 2 analysis.



The business plan contained in this Phase 1 report is based on detailed primary and secondary source research as well as consultation with a range of stakeholders (in addition to public outreach performed as part of the work program). Notwithstanding, the development of a business model for a preferred facility concept will be further informed by the Phase 2 analysis of candidate sites, design options and capital costs should HRM Council decide to proceed to Phase 2.

It is anticipated, therefore, that Phase 2 will enable a full value-for-money (VFM) assessment to be conducted that addresses the full range of costs and benefits associated with the project – including those related to capital costs, operations, alternative site locations and resulting economic and social benefits.

### **What Scale of Facility is *Required* for the FIFA 2015 Women’s World Cup, Other Major Events and Future Potential Sporting Franchises**

The emphasis here is on facility seating requirements rather than market demand for attendance at any one particular event. Moreover, amenities and services of the stadium will need to be scaled accordingly. The following table illustrates the facility seating requirements for the FIFA 2015 Women’s World Cup event as well as other major events and future potential sporting franchises.

<b>Facility Seating Requirements</b>		
	<b>Minimum Permanent Seats</b>	<b>Total Seating Requirement (Permanent and Expanded)</b>
FIFA 2015 Women’s World Cup	10,000	20,000
Future FIFA, CONCACAF events (women’s)	10,000	20,000
Future FIFA, CONCACAF events (men’s)	20,000 generally	
Future FIFA, CONCACAF events (youth)	Fewer than 10,000	
Major World Cup qualifier event	50,000 (and natural grass playing field)	
Canadian Football League (CFL)	25,000	
Major League Soccer (MLS)	18,000-20,000	

### **Demonstrating Need**

There are two elements to the business planning for a stadium: (i) the need for and impact of additional field and related infrastructure, suitably located to maximize its impact, and (ii) the opportunities for significant sport tourism, spectator events and large scale “mega” events created by a large, open air stadium.

Sports fields in HRM represent a vital aspect of the community’s collective recreational resource, providing meaningful, locally available access to active sports and recreation, and is the canvas on which the Region’s non-profit user groups take primary responsibility for the delivery of a number of recreational activities.

Sports fields accommodate traditional sports and new ones alike – the growth of disc sports including Ultimate Frisbee as well as the continued growth of soccer and football reflects the importance of outdoor facilities to the quality of life in HRM. For this reason, HRM has a guiding principle, as established by the 2008 Community Facility Master Plan, of building and/or supporting the development of additional artificial

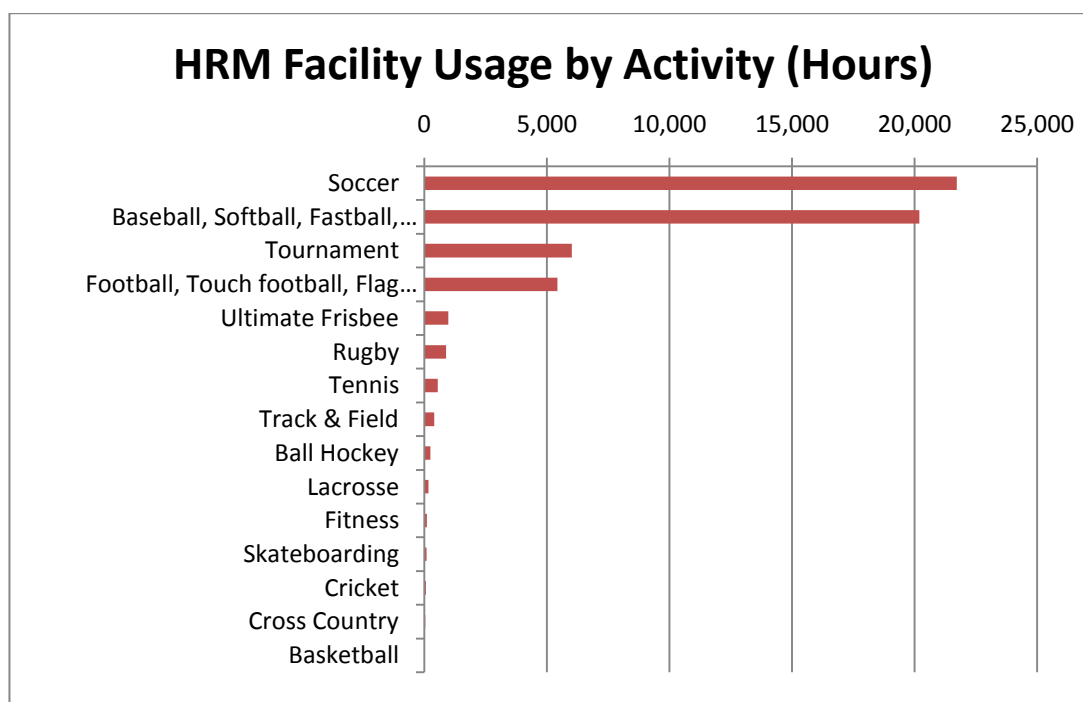
turf as well as indoor artificial turf facilities. With over 30,000 hours of sports field time allocated each season, the development of field turf in a new stadium by 2015 will provide needed additional recreational infrastructure.

Stadium Field Programming Impact		
<i>Total HRM Sportfield and Artificial Turf Usage (2009):</i>		<i>30,172 hours</i>
HRM Facility Name	Annual Usage in Hours (2009)	Proportion of Total Sportfield and Artificial Turf Usage
Dartmouth Sportfield 1	1,707	5.7%
Halifax Sportfield 1	1,623	5.4%
Dartmouth Sportfield2	1,556	5.2%
Halifax Sportfield 2	1,533	5.1%
<b>Estimated Stadium Annual Field Usage</b>	<b>1,500</b>	<b>5%</b>

Soccer as well other field sports are growing nationally, provincially and locally. While the nation as well as many communities and regions (including HRM) are experiencing an aging of the population, participation trends are not tied exclusively to demographic shifts; changes in participation – growth or decline – reflect a wider range of factors including historic roots in individual sports, depth and sophistication of community organization of the sport, quality of facilities, and socio-economic, cultural and other dynamics.

The development of a major stadium, above and beyond the community-level facilities which exist, can be expected to help accelerate the growth of field sports in the HRM and the Province contingent on the necessary programming and commitment to community access being maintained.

There is a current unmet demand for indoor field turf facilities, a demand that can be expected to increase over the period to 2015 as the population growth in HRM continues to outpace the existing “high” growth projections of the Municipality. This report outlines in detail the pattern of changes in participation in a range of field and other sports and includes a full assessment of provincial-level statistics. While participation registration data is often subject to the normal limitation of capturing only “organized” sports (for example golf has lower membership of clubs but a far more significant participation by players unaffiliated with a club or program), and often does not capture adult participation fully, it is clear that soccer in Nova Scotia, as in other provinces, is a leading participant sport, alongside hockey (27,000 and 24,000 registered players provincially). Research demonstrates important social benefits arising from access to sports which have relatively low barriers to entry (such as team sports like soccer) in addition to the health and developmental benefits of active participation, all of which are policy goals of all levels of government.



Beyond soccer, other field sports are growing regionally and while specific needs for additional facilities may not be as apparent, these groups define a range of opportunities for hosting events and tournaments at a stadium, as well as the potential for co-locating facilities with a stadium.

The consultant research included small group meetings, one on one meetings as required and a survey of all provincial sport organizations (PSOs). What we heard from these groups is summarized below:

Sporting Organization	Demonstrated Growth/Need
<b>Soccer Nova Scotia</b>	Provincial membership is trending upward; Largest registered sport in the Province; Wide range of provincial and Atlantic events hosted annually and which can be bolstered by a signature spectator facility; Significant demand for indoor soccer; Capacity for Canadian Soccer Association Matches annually.
<b>Football Nova Scotia</b>	Need for additional access to turf fields as the current supply of fields is insufficient to meet demand.
<b>Rugby Nova Scotia</b>	50% of Rugby Nova Scotia's membership (approximately 450) reside in HRM. Growth in membership; preference for playing on natural grass.
<b>Lacrosse Nova Scotia Society</b>	Field Lacrosse membership is growing.
<b>Field Hockey Nova Scotia</b>	Membership is anticipated to grow by 5-10% annual over the next 3 years.
<b>Athletics Nova Scotia</b>	Membership is anticipated to grow by 17% in the next year. HRM does not have the capacity to accommodate a track and field competition above the provincial championship level.
<b>Tennis Nova Scotia</b>	A recent Tennis Canada supported a survey, suggests that HRM could support a construction of 40 indoor tennis courts.

## **Demonstrating Opportunity and Potential Impact**

The stadium business case is not based solely on community usage, fundamental thought that is as an ongoing use of the stadium – the analysis indicates strongly that the summer and winter utilization of the field will be significant and is a baseline contribution to the revenue base of the facility.

The development of a stadium, replete with grandstands and associated building amenities is based also on the opportunity that exists in HRM to capture a part of the events market that it has been unable to achieve to date – thereby creating net incremental benefits to HRM. Given the type of events that can be attracted (even while occasional), a proportion of these can also be considered as achieving net economic benefits to the Province as a whole (i.e. creating tourism receipts for Nova Scotia that otherwise may not have been captured).

The opportunity lies in the range of events which can be attracted to an integrated stadium venue – events, many of which are more participatory in nature than spectator-based. However, nestled in among the full sweep of provincial and Atlantic regional events, are a number of larger-scale, ticket-revenue generating events. The analysis contained in this report identifies a long list of events which occur nationally and internationally, and creates an illustrative list of potential events that could be held at the stadium over a 10 year period beginning in 2015. As many of these opportunities are competitively bid between cities, provinces and countries, a heavy discount is applied. The resulting estimate of “possibles” reflects a more regional scale of opportunity for events, some of which may be annual with others being less frequent.

## Possible Major Events and Indicative Attendance

### Years 1-4

- Football: Uteck Bowl (7,500)
- Field Hockey Canada National Championships (10,000)
- Soccer: CSA National Event held annually (15,000)
- Soccer: CONCACAF Championship Event (3 events @ 15,000 = 45,000)
- Soccer: FIFA Women's World Cup (3 events @ 20,000 = 60,000)
- Major Entertainment Event (20,000)

### Years 5-8

- Football: Uteck Bowl (7,500)
- Soccer: CSA National Event held annually (15,000)
- Football: Vanier Cup (30,000)
- Women's Lacrosse World Cup (10 events @ 4,000 = 40,000)
- Soccer: CONCACAF Championship Event (3 events at 20,000 = 60,000)
- Major Entertainment Event (20,000)

### Years 9-11

- Football: Uteck Bowl (7,500)
- Field Hockey Canada National Championships (10,000)
- Soccer: CSA National Event held annually (15,000)
- World Lacrosse Championship (10 events @ 5,000 = 50,000)
- Major Entertainment Event (20,000)

The financial analysis that accompanies this business case is based on a selection of event opportunities and is a conservative appraisal of event potential in a competitive landscape. As a result, the annual financial contribution from these events is considered achievable. The resulting economic benefits are both considerable and similarly achievable.

In terms of economic impacts, those larger events with greater draw from a larger market area create a series of impacts – in addition to contributing to the operating revenue base of the facility through spending at the stadium, and the positive impacts on the suppliers of goods and services to the stadium, the off-site benefits from visitor spending are potentially net gains to HRM. Depending on the event, these gains can be considerable, and are typically distributed across the local economy as a whole.

The opportunity to capture events and impact (both economic and in wider community terms) is an example of HRM's existing commitment to its economic development mandate. The HRM Corporate Strategy 2011-2012, the Greater Halifax Economic Strategy 2011-2016, the 2010 Event Strategy, and the

commitment to rejuvenating the Regional Centre as well as other policies of HRM, all identify public investment and leveraging private investment as a means to maximize growth opportunities, maintain and grow the Halifax brand and retain talent in the community. Indeed the provision of event infrastructure, as well as premium community sporting facilities, is part of the attraction package of any community – and its capacity to attract and retain young people.

### **What Factors are Important to the Operating Business Case**

As a result, any development of a stadium should:

- Respond to HRM recreational needs, provide an opportunity for excellence in sports participation, coaching and create lasting infrastructure;
- As an event centre, be an engine of economic impact; and
- Create an opportunity for future expansion of the stadium as the opportunity allows.

## The Options

The Phase 1 report considers a range of options based on the range of considerations outlined above.

	Option	Description	FIFA Compliance	Legacy Potential/ Expansion Capacity	Contribution to Local and Provincial Economic Impact	Preference
1	<b>Do Nothing Or Build Temporary</b>	Business as Usual	FIFA requires 20,000 chair backed seats, 10,000 of which are considered permanent.	None	Significant lost opportunity in terms of future spectator and participatory event-related economic development.	Temporary not an option.
2	<b>Build Minimally for the FIFA Tournament</b>	Build the minimum number of permanent seats without development of a grandstand; building areas constructed at lower cost and to meet minimum FIFA requirements for tournament.	Must meet FIFA seating capacity and functional requirements both for internal space, circulation, exhibition area, security and other needs.	Does not maximize legacy opportunities, enable expansion on existing base of development; fails to deliver opportunity for a range of users at the site.	Highly limited over the long term; Operations would be seasonal only and limited large scale events forthcoming.	Poor reputational leverage for City; No long-term value for money (minimum cost would be \$30 million).
3	<b>Develop Grandstand-based Permanent Seating Facility</b>	Build 10,000 to 11,000 (design-based determination) permanent seats in one principal grandstand and an opposing secondary grandstand. Includes necessary temporary seating (9,000 to 10,000 seats) to host FIFA tournament.	Compliant and provides a higher standard of fit-up of interior building spaces necessary for hosting not only FIFA tournaments but also some national soccer team and other exhibition games.	Significant - premise of the development rests on expansion on the existing building base with minimal tear-downs of existing permanent structure should expansion of permanent seating become a necessity. Maximizing legacy potential still rests on temporary seating as needed. Expansion of permanent seating could allow for accommodation of a professional sporting franchise (MLS or CFL).	Inclusion of a fully programmed building / grandstand offers a basis for multi-use and development of campus of sports-related uses; Good potential for economic impact from maximizing both participatory and spectator events.	Best Value for Money - ease of incremental expansion is critical attribute; variant exists for additional permanent seating with limited operational impact; Development of a campus with potential for placing track and field and other training /playing surfaces adjacent will maximize event appeal of the venue.

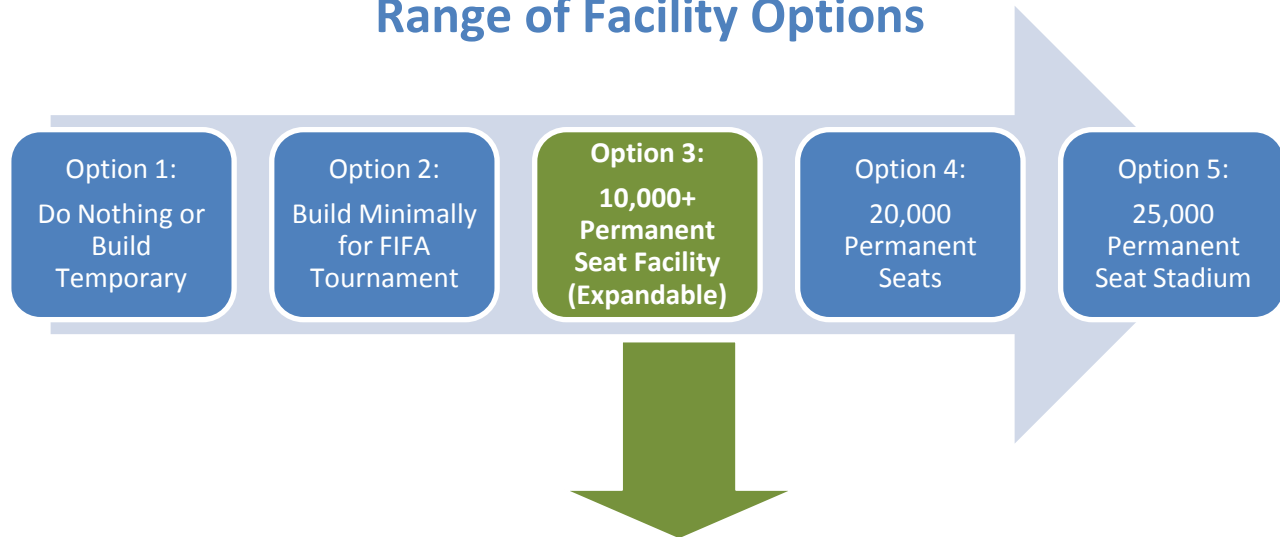
	Option	Description	FIFA Compliance	Legacy Potential/ Expansion Capacity	Contribution to Local and Provincial Economic Impact	Preference
4	<b>20,000 Permanent Seats</b>	Build all of the seating to permanent standard with grandstands per above and additional seating at opposing ends of the field.	FIFA Compliant - and exceeds marginally the MLS stadium requirements; Importantly, this fails the CFL seating requirements.	Expansion capability would be essential in the absence of MLS; Facility would accommodate major international soccer games (incl. World Cup Qualifiers) but with high profile games, natural grass is essential.	Unlikely to be significantly greater than a 10,000-11,000 seat permanent venue of high quality with a multi-use mandate.	Significant diminishing Returns from additional capital investment despite limited additional operating costs; Field turf requirements of community use are in conflict with FIFA needs; No advantage to a 20,000 permanent seat facility operating as both a provincial recreation and event centre.
5	<b>25,000 Permanent Seat Stadium</b>	Building of a stadium capable of hosting a CFL franchise.	Compliance for CFL but no gain for FIFA compliance (and presence of field turf reduces utility by for FIFA sanctioned senior games).	In the absence of MLS and CFL, legacy potential no greater than a moderate sized facility (10,000 seats plus temporary seating capacity and with expansion potential).	No greater in the absence of a CFL franchise.	Not a value for money proposition at this time - scale of capital cost and depreciation such that the maximum expandability and most flexible site location are better principles to adopt at this time; Government will not currently fund overt plans for stadiums specific to professional teams and wider events and community based model of stadium operation does not warrant this scale.



## The Preferred Concept

The market will support a facility of 10,000 permanent seats. However, it is essential that a facility of this size be expandable both on a temporary basis (to 20,000 seats) as well as on a permanent basis should a future business case support the incremental capital cost of additional permanent infrastructure. A fully built-out grandstand base building with a range of building occupancies including potential lease space, offices, and the potential for shared services with other on-site or nearby recreation facilities, is a central feature of the stadium.

## Range of Facility Options



### Indicative financial performance based on two scenarios

	Financial Performance	Potential Economic Impact	Community ROI
<b>Scenario 1 (conservative)</b>	Annual Deficit to Facility of \$475,000 (incl. capital reserve) \$190,000 (excluding capital reserve)	\$3.5-5.3m annually to HRM from event spectators and participants	Community impact is a function of a number of factors including the range of uses developed on site, location and accessibility to a majority of the HRM resident base; at its core, the stadium will enrich community participation in sport, enable improved services such as coaching, elite training and potentially cultural programming. As such, the facility will contribute to quality of life measures identified in national, provincial and local policies
<b>Scenario 2 (moderate)</b>	Annual Deficit to Facility of \$295,000 (incl. capital reserve), breakeven excluding	\$3.5-5.3m annually to HRM from event spectators and participants	

Option 3 is developed as two scenarios for purposes of estimating the operating financial performance. There is no distinction between the two scenario (1 and 2) in terms of the type and scale of facility or the number of event days or attendance; however, scenario 1 provides a more conservative (or risk-based) assessment of both operating costs as well as revenues from a number of sources other than ticketed events. Scenario 2 provides a more balanced assessment of risk and represents moderately higher revenues while still discounting significantly for risks attached to achieving these revenues.

### **Potential Merit of More than 10,000 Seats**

Consideration should be given to the merits of constructing to a higher permanent seat count (in the order of 13,000 to 14,000 seats). Whilst incurring a higher initial capital cost, this would not translate into an unduly significant increase in operating costs. It is possible that with the additional incremental capital cost to achieve greater than 10,000 permanent seats, the facility could either attract additional events or solidify its competitive position in Atlantic Canada. In addition, the higher permanent seat count translates into a lower temporary seat cost for those events which are successfully attracted to the facility and which require temporary seats to achieve the desired additional capacity.

Factors to consider regarding additional permanent seats beyond the recommended complement of 10,000 include the following:

- The availability of capital funding to pay for the incremental addition and whether all or a portion of those costs would be a burden on the municipal tax base;
- The depreciation of the additional capital asset over time;
- Whether the additional seats would represent permanent or throw away items in the event of a major facility expansion to house a professional sporting franchise; and
- In the interim, public attitude and tolerance towards a stadium with seating capacity which is likely only to be required on an infrequent basis.

### **Ensuring Success through Best Location**

The opportunities surrounding the development of the stadium will be further informed by the choice of location, as will the financial performance of the facility in the medium to long term. The most advantageous location will be one that meets critical, future oriented needs, including:

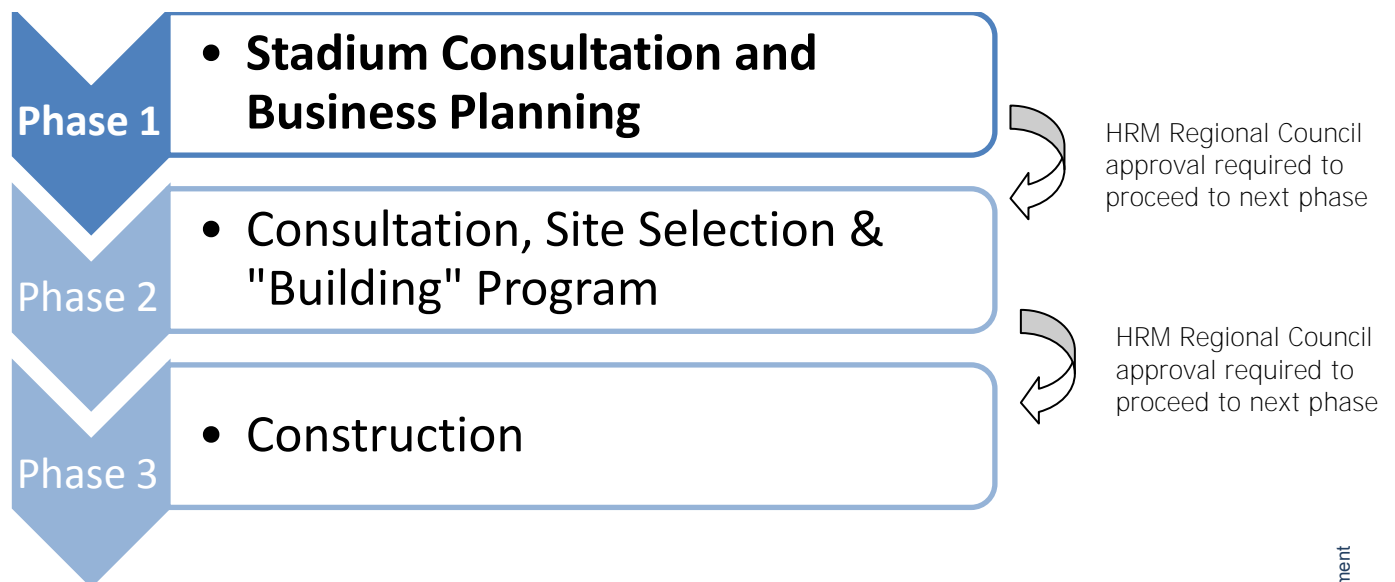
- Regional accessibility;
- Maximizes the benefits of existing infrastructure in the Regional Centre;
- Development as part of an existing campus of recreation and other complimentary uses, or in close proximity to other such uses;
- Enables expansion on-site to accommodate the potential evolution of the Stadium as a larger spectator and entertainment venue; and
- Creates opportunities for private development which benefits from the operation of the stadium as both a community sports and recreation complex and a pre-eminent spectator venue.

## 1 INTRODUCTION AND PURPOSE

### Section Summary

- Phase 1 of the process, known as the “Stadium Consultation and Business Planning” phase is one of a potential 3 phase process.
- Canada has been selected as the host country for the 2015 FIFA Women’s World Cup. Halifax is one of seven potential host cities in Canada for the 2015 FIFA Women’s World Cup. Four to six cities across Canada are expected to host the games.
- The primary objective of the assignment is *“To determine the need and financial viability of the construction and ongoing operation of a stadium, with the minimum requirement to meet the 2015 FIFA tournament.”*
- HRM is currently considering a mid-scale stadium facility accessible for community usage which may have the capability to house a professional sporting franchise in the future.

In April, 2011 Sierra Planning and Management along with a sub consulting team consisting of CBCL Limited and Novita Interpares was retained by Halifax Regional Municipality (HRM) to develop Phase 1 of a potential 3 phase exercise with regard to the analysis of a potential stadium in HRM. Phase 1 of the process is known as the “Stadium Consultation and Business Planning” phase. The three phases of the analysis are described below:



The analysis of Phase 1 will result in a recommendation to Halifax Regional Council informing the decision of whether or not to proceed to the next phase of the analysis. This report represents the feasibility analysis and business plan for a potential stadium in HRM. The public and stakeholder consultation component of the Phase 1 analysis played a significant role in the development of insights and recommendations to this report. A complete summary of the stadium consultation process is included as Appendix A to this document. Separately, a document outlining the feedback and findings obtained from three public open house meetings held over the month of June titled “Phase 1 Stadium Analysis: Public Open House Summary” has been developed by the consulting team.

## 1.1 OBJECTIVES OF THE EXERCISE

As per the terms of reference of this assignment, the primary objective of the Phase 1 Stadium Consultation and Business Planning exercise is:

*To determine the need and financial viability of the construction and ongoing operation of a stadium, with the minimum requirement to meet the 2015 FIFA tournament. Key consideration is to be given for future sport tourism, major event hosting, community usage and access to the facility.*

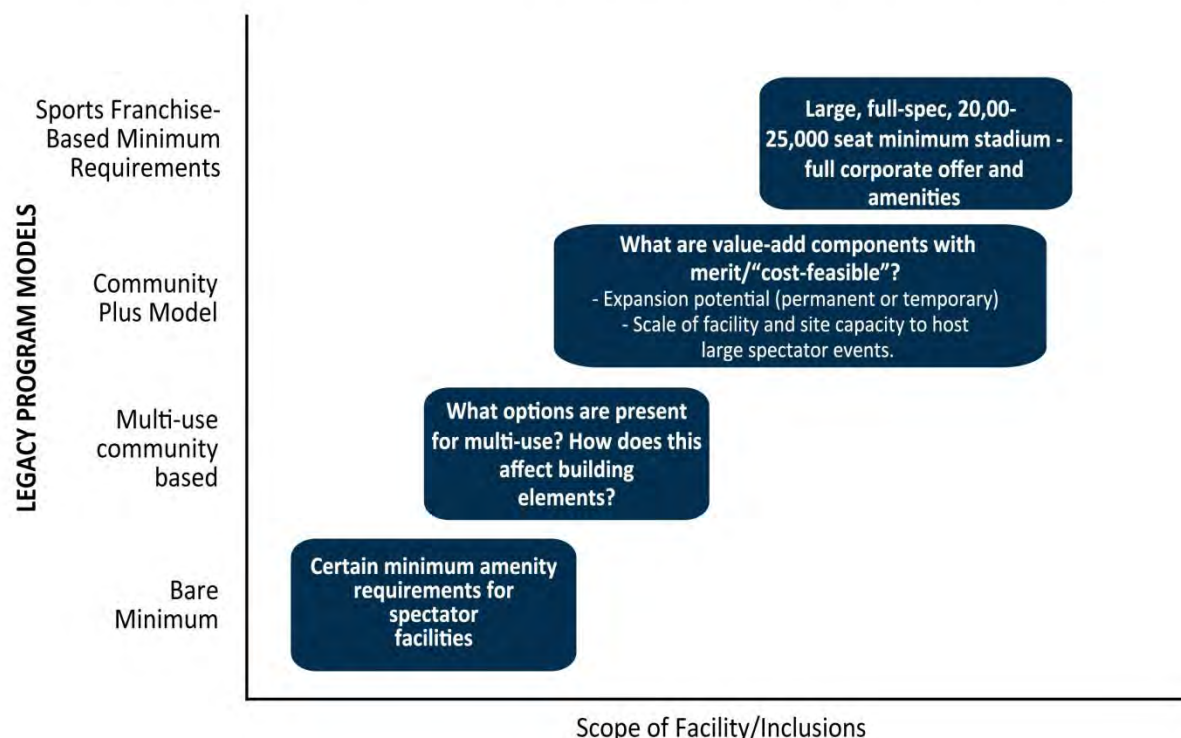
More specific tasks and objectives related to the Phase 1 analysis are to:

- Develop an assessment of the feasibility of developing a stadium facility in Halifax Regional Municipality;
- Engage the public, stakeholders and key informants in the determination of future programming in a potential stadium in HRM;
- Develop an illustrative example of the financial performance of a sustainable stadium facility in HRM;
- To provide informed and knowledgeable recommendations to Regional Council regarding the sustainability of the construction and operation of a facility to meet the FIFA 2015 bid requirements as a minimum standard; and
- Develop a business case which will reflect the approved policies of HRM.

## Methodology

In determining the feasibility of a potential stadium, it is imperative to consider the future programming and event opportunities which exist for a potential stadium and the facility requirements that go along with that. The legacy potential is the subject of this study. Conceptually, the extent and scale of potential use of the stadium after the FIFA event suggests a range of facility types. These alternative facility types form the basis of the research and recommended facility option.

## Analysis Framework: Testing the Alternate Legacy Opportunities



### 1.2 EARLIER FEASIBILITY STUDIES

For many years, stadium development in the Halifax Region has been contemplated, discussed and attempted to varying degrees. The majority of work has been tied to bids to host major sporting events and in some cases, the siting of a potential Canadian Football League (CFL) team.

Discussions of a stadium in HRM first began in 1986 as part of a draft bid for the Commonwealth Games. The following represents a list of documents created on the subject of a stadium in HRM.

- Stadium Proposal (1999) researched by Events Halifax - sited the following proposals to construct a Stadium in HRM:
  - 1994 Halifax Commonwealth Games Bid Committee proposed a stadium as part of the draft bid in 1986;
  - 1999 Pan American Bid Committee proposed a stadium proposed a stadium as the focal point of their presentation in 1992; and
  - 1992 City of Halifax presented a draft Mainland North Common Master Plan, which identified a possible location for a stadium in its Phase 2 plan.
- Stadium Analysis Report (June 2002) Economics Research Associates - commissioned by Events Halifax
- Hosting the Commonwealth Games: An Evaluation of the Region's Opportunity (July 2002)
  - Outdoor Multi-Purpose Venue Review (Draft) (August 2010)

### 1.3 WHAT IS NEW ABOUT THIS ASSIGNMENT?

As described previously, there has been significant interest and some attempts over the past 20 plus years to construct a sport stadium in HRM. In all cases, these discussions have not resulted in the development of full business and economic development analysis, and have not included consultation with public, stakeholders and members of potential user groups.

Phase 1 of the Halifax Stadium Analysis represents the first time that a business plan based on community usage and legacy planning has been developed for a potential stadium in HRM. A business planning exercise focused on the potential financial feasibility based on community use, event programming and a potential future anchor tenant has not been considered until this point in time.

### 1.4 2015 FIFA WOMEN'S WORLD CUP OPPORTUNITY AND FACILITY REQUIREMENTS

FIFA is the acronym commonly used by the Fédération Internationale de Football Association, the international governing body of association football. FIFA is responsible for the organisation and governance of football's major international tournaments, most notably the FIFA World Cup, held since 1930.

The FIFA Women's World Cup is recognized as the most important International competition in women's football and is played amongst women's national football teams of the member states of FIFA. The tournament has been played every four years since the first Women's World Cup tournament was first held in 1991.

FIFA announced on March 3, 2011 that Canada was selected as the host country for the 2015 FIFA Women's World Cup. 24 teams are expected to compete in the 2015 FIFA Women's World Cup. Former host countries include China, Sweden, and the United States. Germany hosted the tournament in 2011.

The Canadian Soccer Association (CSA) is seeking between four – six cities across the Canada to host the 2015 games. HRM is one of seven cities which have shown interest in bidding to stage the games. The seven potential host cities and the details of their respective stadium facilities include:

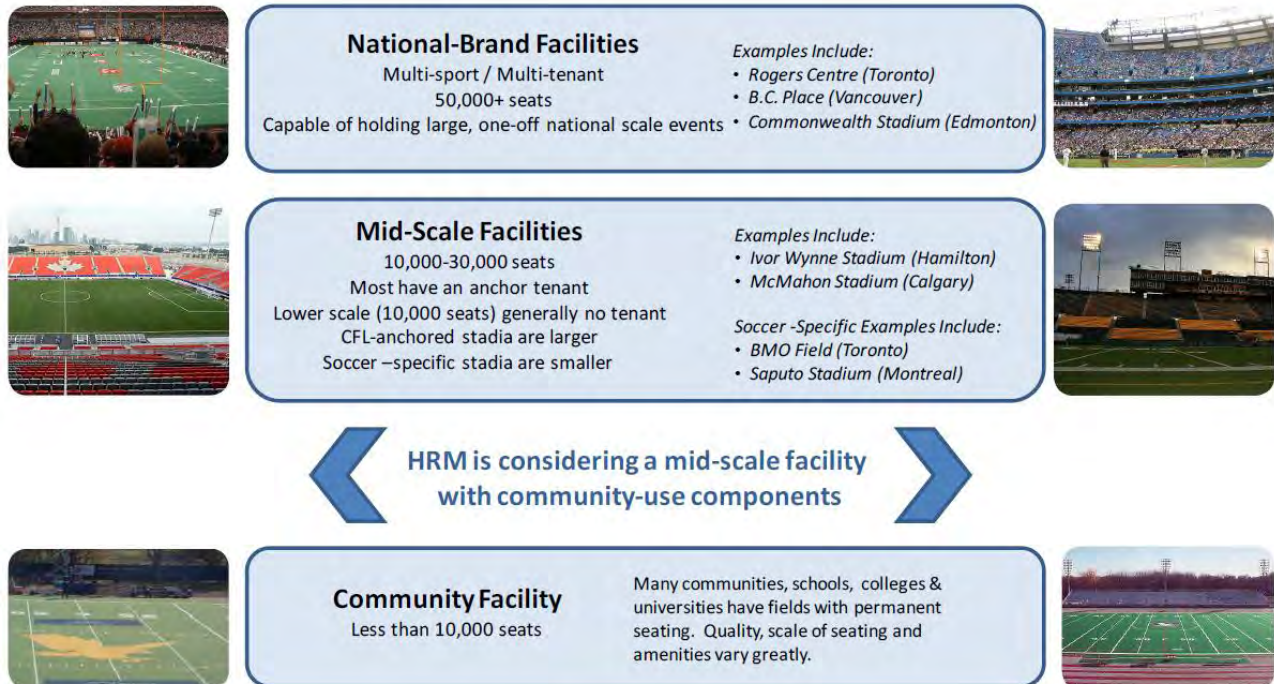
City/Region	Proposed Venue(s)
<b>Halifax Regional Municipality</b>	N/A
<b>Edmonton</b>	Commonwealth Stadium (capacity 60,081)
<b>Montreal</b>	Olympic Stadium (capacity 66,308)
	Saputo Stadium (capacity 13,034, planned expansion to 20,341)
<b>Vancouver</b>	BC Place Stadium (capacity 54,500)
<b>Winnipeg</b>	New Winnipeg Blue Bombers Stadium (projected to open in 2012, capacity 33,000 expandable to 40,000)
<b>Ottawa</b>	Frank Clair Stadium (capacity 26,559, expandable to 45,000)
<b>Moncton</b>	Moncton Stadium (capacity 10,000, expandable to 20,725)

A host city is required to provide an outdoor venue with a minimum seating capacity of 20,000, which can include a mix of temporary and permanent seating. HRM is the only potential host City without an existing venue.



## 1.5 WHAT SCALE OF STADIUM IS HRM CONSIDERING?

At the outset of Phase 1 of the stadium analysis process, the scale, amenities, location or other such details of a potential stadium in HRM were not yet defined. Upon preliminary information gathering, the consultants were able to scope down to the range of possibilities for a stadium facility in terms of scale. In place of providing a definition of what a potential stadium in HRM might be, we are able at this time to provide an illustration of the range of which a potential new stadium in HRM may not be. The exhibit below describes the spectrum and scale of Canadian stadia, ranging from National-brand facilities to community facilities:



HRM is currently considering a mid-scale stadium facility accessible for community usage which may have the capability to house a professional sporting franchise in the future.

## 1.6 LIMITATIONS OF THE ANALYSIS

For the assignment which follows, Sierra Planning and Management and its sub-consultants relied on a range of information sources, including secondary source data prepared by the Halifax Regional Municipality, consulting reports and information provided by the Halifax Regional Municipality, data from Statistics Canada, various sporting associations and others. While Sierra has attempted to verify all secondary data, we make no representation as to the accuracy or completeness of the information received.

The content of this report is based therefore on the consultant team's knowledge of the project, information available and mitigating circumstances at the time of writing. All assumptions which underlie the analysis are subject to potential change over time and should be revisited as appropriate as market conditions evolve and the project proceeds toward development. Any use of this report by a third party is entirely at its own risk.

## 1.7 OUTLINE OF THE REPORT

The report which follows is outlined in a manner which presents a situational overview of the Halifax Regional Municipality in terms of socioeconomic and recreational trends, then provides a listing of the potential opportunities and events which could be captured by a new stadium. The report continues with the development of a range of facility options, a demonstration of illustrative financial performance and discussion of delivery and risk. The report concludes with a prudent analysis of recommended actions based on well-researched data and stakeholder input. Specifically, the report is outlined as follows:

- Section 2 provides context in terms of the economic positioning of HRM relative to other Canadian Municipalities, reaffirming its status as a hub city in Canada. The section also provides an overview of both provincial and regional population metrics including projections;
- Section 3 addresses various forms and scales of stadia which exist in the North American context including a case study review of comparable or noteworthy examples of existing stadia. This section also includes a review of current stadia under development or redevelopment in Canada;
- Section 4 outlines the minimum specified stadium requirements for various hosting opportunities including the FIFA 2015 Women's World Cup event, a CFL franchise and an MLS franchise;
- Section 5 speaks to the opportunities for housing a professional sporting franchise and recreation trends in sport participation in various field sports Nationally, Provincially and Locally;
- Section 6 describes the opportunities for participatory and spectator sporting events, as well as opportunities arising from the non-sports (entertainment) events market;
- Section 7 lists and describes principles to guide the determination of both form and function of a prospective spectator stadium as well as considerations for stadium development;
- Section 8 outlines a range of options for development of a stadium facility in HRM and includes an illustrative listing of potential capital cost elements. The section concludes with a detailed description of a range of options for stadium development;
- Section 9 provides considerations with regard to siting of a stadium facility in HRM including strategic policy directions of the municipality as well as a listing of locational criteria developed in concert with input received from the community and key informant engagement process;
- Section 10 provides a discussion on various project delivery models and considerations with regard to various ownership and operating models of a potential facility;
- Section 11 describes the schematic financial performance scenario of a potential facility in HRM;
- Section 12 describes project risk with regard to development, design, construction and operations;
- Section 13 includes a literature review of the potential economic benefits and spin-offs which might result from development of a multi-use sports and entertainment facility. This section also includes an illustrative example of the economic impacts arising from stadium construction and off-site spending related to stadium events; and
- Section 14 summarizes the recommended directions of the Phase 1 analysis.



## 2 PROFILE OF A REGIONAL ECONOMIC ENGINE

### Section Summary

- Halifax Regional Municipality is known as the economic hub of the Atlantic Region of Canada
- The Halifax Region boasts a number of regionally and nationally significant tourism assets and attractions as well as many important regional economic assets.
- Nova Scotia is the most populous province in Atlantic Canada and its capital – Halifax Regional Municipality – is the largest city in the region.
- The HRM population has been growing and is projected to grow by 65,280 persons from 2006 to 2026.
- A total of almost 700,000 people live within a 2 hour drive time of HRM.

The Regional Municipality of Halifax is the Capital of the Province of Nova Scotia. Geographically, it is the largest municipality in Canada at 5,600 square kilometres. With a population of approximately 400,000, HRM is the largest population centre in Atlantic Canada and the largest in Canada east of Quebec City. The urban area of HRM represents a major economic centre in eastern Canada with a large concentration of government services, financial institutions and privately owned firms. HRM accounts for 40% of Nova Scotia's population, and 15% of that of Atlantic Canada. The census metropolitan area (CMA) of Halifax is the 13<sup>th</sup> most populous in Canada. This section will provide an economic overview of HRM and an analysis of relevant population metrics both regionally and provincially. A full socio-economic analysis of the HRM population is included in Appendix B.

### Top 20 Census Metropolitan Areas in Canada by Population

Rank	CMA Geographic Name	2006 Population
1	Toronto, ON	5,113,149
2	Montreal, PQ	3,635,571
3	Vancouver, BC	2,116,581
4	Ottawa-Gatineau, ON/PQ	1,130,761
5	Calgary, AB	1,079,310
6	Edmonton, AB	1,034,945
7	Quebec City, PQ	715,515
8	Winnipeg, MB	694,668
9	Hamilton, ON	692,911
10	London, ON	457,720
11	Kitchener, ON	451,235
12	St. Catharines-Niagara, ON	390,317
13	Halifax, NS	372,858
14	Oshawa, ON	330,594
15	Victoria, BC	330,088
16	Windsor, ON	323,342
17	Saskatoon, SK	233,923
18	Regina, SK	194,971
19	Sherbrooke, PQ	186,952
20	St. John's, NL	181,113

## 2.1 ECONOMIC OVERVIEW OF HRM

Halifax Regional Municipality is known as the economic hub of the Atlantic Region of Canada and the regional center of business and finance, hospital/medical services, research facilities, public administration and transportation. The Conference Board of Canada defines an economic hub City as one which is an economic leader in the Province or Region. Eight other metropolitan areas function as hub cities for their provinces—Vancouver, Calgary and Edmonton, Regina and Saskatoon, Winnipeg, Toronto and Montréal.

Hub Cities in Canada
Halifax
Montreal
Toronto
Winnipeg
Saskatoon
Regina
Edmonton
Calgary
Vancouver

The Conference Board concluded in a 2006 study that investments in hub city infrastructure must be made for benefit to the entire region influenced by that hub city.

According to the HRM's Corporate Initiatives 2008-2009 report, HRM is a \$10 billion economy, generates 47% of provincial GDP, and is home to more than half the province's businesses: information & culture, technical, management and educational services, waste management, finance and insurance. The average household income is \$75,692 – above the national average.

According to the Nova Scotia Community Counts survey conducted in 2010, Halifax Regional Municipality had a total of 24,030 companies. Canadian business pattern data from Statistics Canada (2009) shows that 62 head offices are established in HRM, representing 41% of the total head offices in the Maritime provinces. It is generally understood that head and regional head offices tend to locate in larger urban centres which offer competitive advantages and attractive quality of life attributes. Among the top employers in the Halifax region are; Capital Health, the Department of National Defence, Halifax Regional Municipality and Dalhousie University.

### Major Employers in Halifax

Company Name	Number of Employees, 2009	% of Total Employment
Capital Health	11,000	5.0%
Department of National Defence - CFB Halifax	7,400	3.3%
Halifax Regional Municipality	3,500	1.6%
Dalhousie University	3,500	1.6%
IWK Health Centre	3,400	1.5%
Fleet Maintenance Facility Cape Scott	3,400	1.5%
Bell Aliant Inc.	1,800	0.8%
I.M.P. Aerospace Division - Halifax	1,200	0.5%
Staples Business Delivery	1,100	0.5%

Company Name	Number of Employees, 2009	% of Total Employment
BMO Financial Group	1,000	0.5%
GEM Health Care Group	1,000	0.5%
Saint Mary's University	1,000	0.5%
I.M.P. Group International Inc.	900	4.1%
Eastlink	830	0.40%
Northwoodcare Inc.	800	0.40%
Manulife Financial	750	0.30%
Signature Resorts	750	0.30%
Convergys Canada	700	0.30%
Nova Scotia Power Inc., An Emera company	700	0.30%
Bedford Institute of Oceanography	650	0.30%
Blueocean Contact Centers	625	0.30%
Trade Centre Limited	620	0.30%
Canadian Coast Guard - Marine House	600	0.30%
Mount Saint Vincent University	600	0.30%

Source: Greater Halifax Partnership Smartbusiness Database

HRM is home to a number of significant regional economic assets including:

- The Halifax Stanfield International Airport;
- The Halifax Harbour and Port;
- 6 Post-Secondary Educational Institutions; and
- 62 Head and Regional Offices and a community of executive level management for national and international companies.

### Transportation

The sustained success of the HRM economy is in part attributable to its geographic positioning as a major transportation hub in Atlantic Canada. Halifax Harbour is a major port used by numerous shipping lines, administered by the Halifax Port Authority. The Halifax Port Authority's various shipping terminals constitute the eastern terminus of Canadian National Railway's transcontinental network. The Halifax Railway Station also serves as the terminus for Acadian Lines intercity buses which serve destinations across Atlantic Canada.

Halifax Stanfield International Airport serves HRM and most of the province, providing regularly scheduled flights to domestic and international destinations.

The urban core of HRM is served by Metro Transit, which operates standard bus routes, bus-rapid transit routes, as well as the pedestrian-only harbour ferries.

### Academic Institutions

HRM has a reputation of highly regarded academic institutions and a well educated population. In 2010, Halifax was ranked 6<sup>th</sup> in an analysis of Canada's Smartest Cities by MacLean's Magazine and the Canadian Council on Learning, beating out Toronto, Montreal, and Winnipeg among others. The study is based on Canadian Council on Learning's composite learning index which reflects lifelong learning opportunities.

Greater Halifax is home to six post-secondary institutions:

- Atlantic School of Theology;
- Dalhousie University;
- Mount Saint Vincent University;
- NSCAD University;
- Nova Scotia Community College;
- Saint Mary's University; and
- University of King's College.

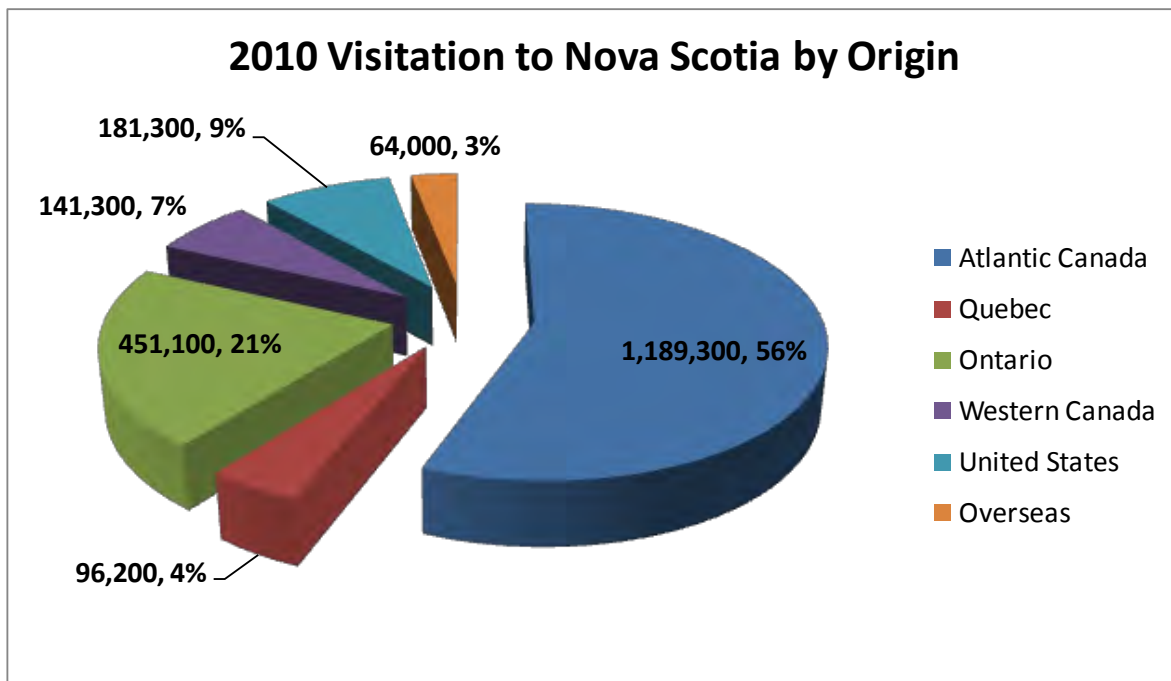
According to estimations by the Greater Halifax Partnership, these institutions currently have 5,538 graduate students and 25,014 undergraduate students enrolled. For comparison, the top 5 universities by total student population are:

Top 5 Universities in Canada by Student Population	
University Name	Total Student Population
University of Toronto	77,288
Universite de Montreal	72,726
University of British Columbia	54,125
York University (Toronto)	54,000
Universite de Laval	39,837

Given the size of the resident population in HRM (372,679 in 2006), the number of students enrolled in the various post-secondary academic institutions in the region represent a substantial part of the population at almost 7%.

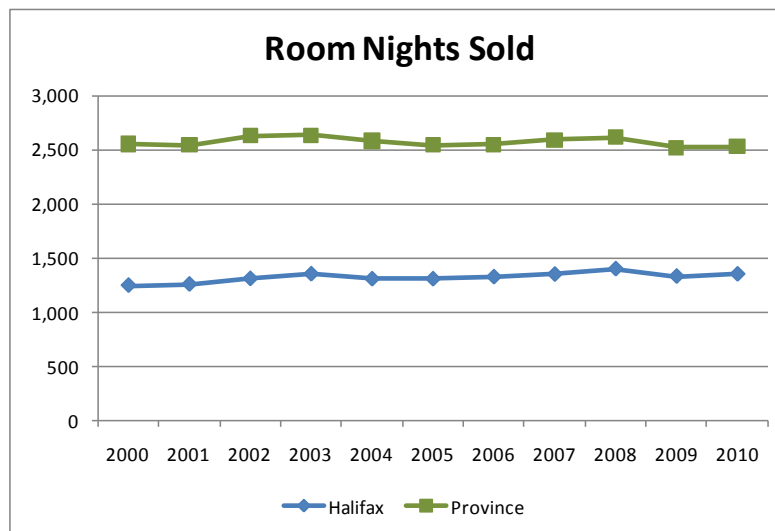
### Tourism

The Halifax Region boasts a number of regionally and nationally significant tourism assets and attractions including, national historic sites, parks, museums, festivals and events. In addition to the multitude of tourism attractions and events, the Region contains a significant number of accommodations and other visitor hosting infrastructure such as restaurants and retail. In 2010, 2.1 million tourists visited Nova Scotia, 88% of whom were Canadians. Canadian visitors included nearly 1.2 million from Atlantic Canada, nearly 100,000 from Quebec, over 450,000 from Ontario, and more than 140,000 from Western Canada.

**Exhibit 1 Visitation to Nova Scotia by Origin**

Source: Sierra Planning & Management based on Nova Scotia Economic and Rural Development and Tourism, 2010 Estimated Total Visitation by Origin

Analysis of total fixed-roof accommodation room nights sold in the Halifax region shows little growth in the number of room nights sold over the last 10 years. The figures shown are calculated based on reports submitted by all licensed fixed-roof accommodations (i.e. hotels, motels, B&B's, etc.) in Nova Scotia.

**Exhibit 2 Room Nights Sold 2000-2010**

Source: Sierra Planning & Management based on Nova Scotia Department of Tourism, Culture and Heritage, Nova Scotia Tourism Indicators 2000-2010

It is important to note, however, that the number of rooms sold in Halifax and the Halifax Region has grown as a proportion of the provincial figure over the 2000-2010 period. In 2000, the number of room nights

sold in Halifax and the Halifax Region represented 49% of the provincial figure, while in 2010, it represented 53%.

### National Shipbuilding Procurement Strategy Opportunity

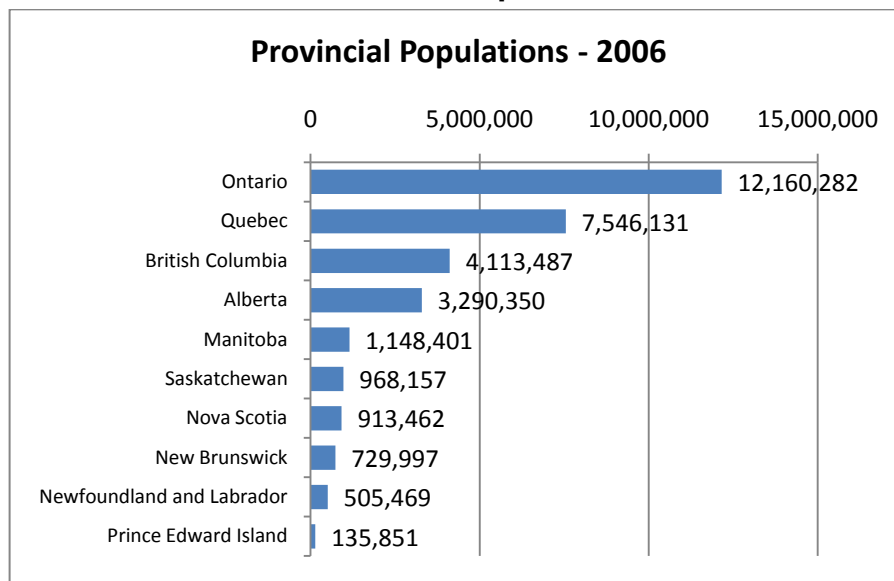
The Halifax Shipyard has the possibility to become one of two major suppliers of shipbuilding to the Canadian government as a result of the National Shipbuilding Procurement Strategy. More than 20 combatant surface vessels would be built in HRM as a result of this contract.

This potential opportunity could mean about \$30 billion dollars in the local economy over the next 30 year as well as approximately 4,000 direct jobs created and sustained in the Province.

## 2.2 POPULATION METRICS – PROVINCIAL

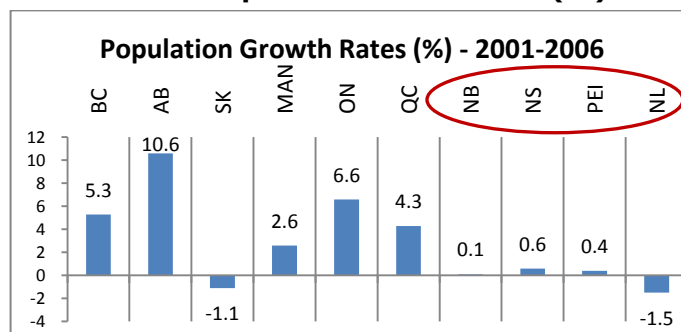
According to the 2006 Census, the population of Nova Scotia was 913,462, which represents a 0.6% growth in population from 2001 to 2006. This modest increase in population growth comes after a period of negative growth (-0.1%) from 1996 to 2001. Compared to other provinces in Canada, Nova Scotia is ranked seventh in terms of total population numbers in 2006 (see Exhibit below). Nova Scotia is the most populous province in the Atlantic Canada and its capital – Halifax Regional Municipality – is the largest municipality in the region.

**Exhibit 3 Provincial Populations - 2006**



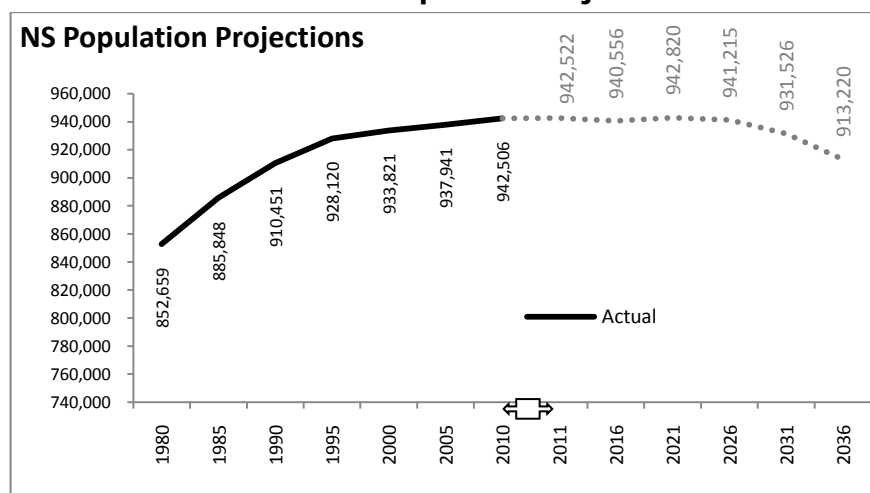
Source: Statistics Canada. 2007. Population and Dwelling Count Highlight Tables. 2006 Census

Notwithstanding its modest population growth rate of 0.6%, Nova Scotia was the province with the highest population growth rate amongst the Atlantic Provinces (denoted in red in the exhibit below) from 2001 to 2006. The following exhibit also compares Nova Scotia to other Canadian provinces.

**Exhibit 4 Provincial Population Growth Rates (%) 2001-2006**

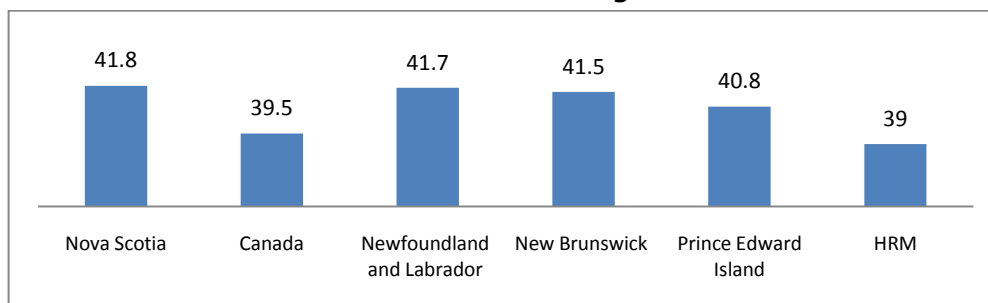
Source: Statistics Canada. 2007. Population and Dwelling Count Highlight Tables. 2006 Census.

Nova Scotia is projected to have negative population growth from 2010 to 2036, as shown in the following exhibit. HRM, however, is expected to grow as will be discussed in the following section.

**Exhibit 5 Nova Scotia Population Projections to 2036**

Source: Estimates of Population, CANSIM 051-0001 & NS Finance Projections

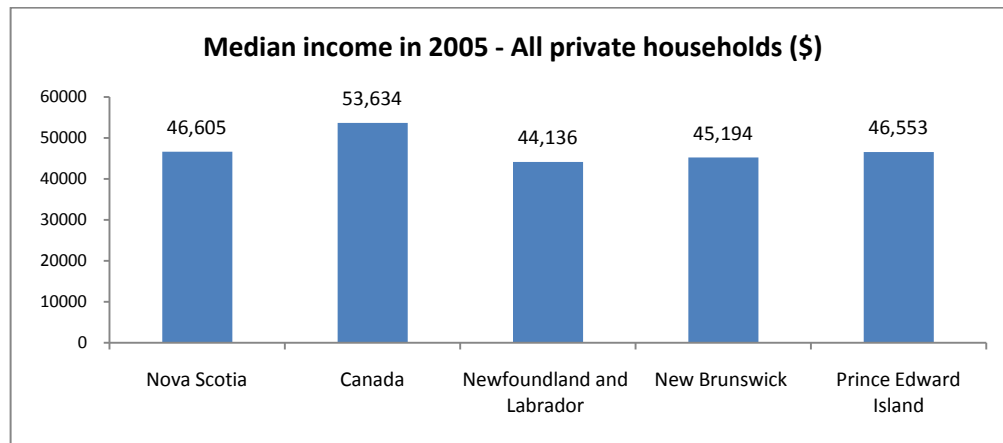
The following exhibit compares the median age in the Atlantic Provinces, Halifax Regional Municipality and Canada. The median age in Nova Scotia is 41.8, which is slightly higher than the national figure of 39.5. The aging population in Nova Scotia is consistent with the other Atlantic Provinces; however Halifax Regional Municipality has a relatively younger population than the national average with a median age of 39.

**Exhibit 6 Median Age**

Source: Statistics Canada. 2006 Community Profiles.

The following exhibit shows the median household income in each of the Atlantic Provinces compared to the national figure. The household median income in Nova Scotia in 2005 was \$46,605, which was below the national median income of \$53,634, but higher than the median household incomes in the rest of Atlantic Canada.

**Exhibit 7 Median Income in 2005**



Source: Statistics Canada. 2006 Community Profiles.

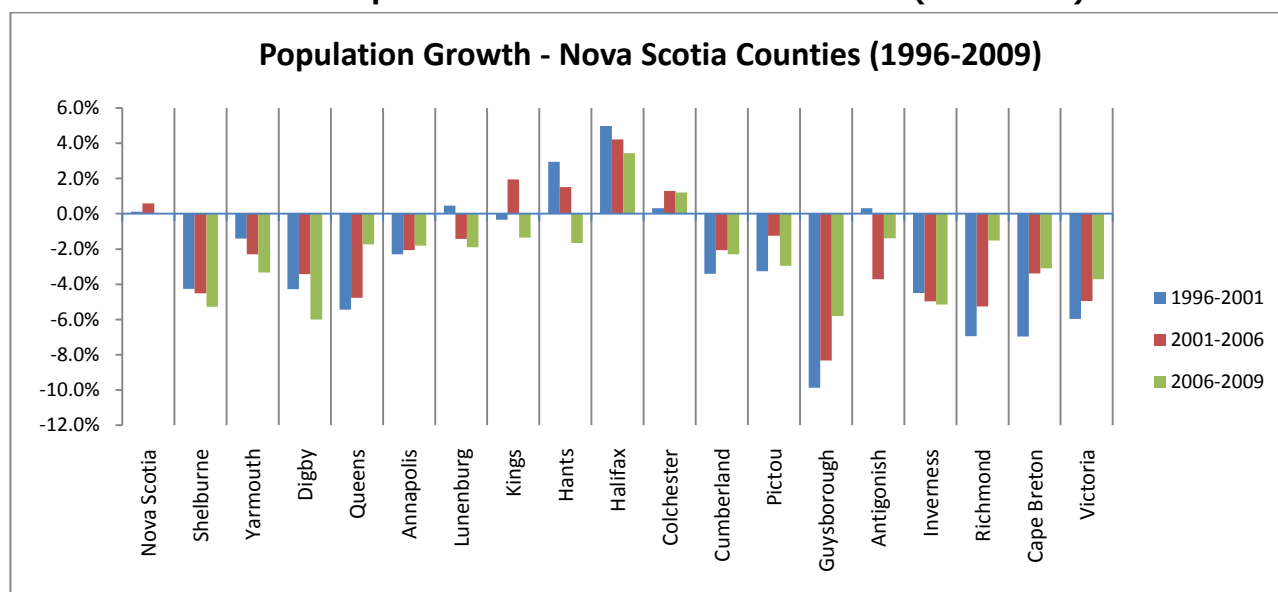
## 2.3 POPULATION METRICS – REGIONAL

The population of Nova Scotia as a whole has experienced very little growth from 1996 to 2006 and is projected to have negative growth from 2010 to 2036, however, that is not representative of the situation in the Halifax Regional Municipality. The HRM population has been growing and a study completed in 2009 showed that the municipality was projected to grow by 65,280 persons from 2006 to 2026 under a medium growth scenario and by 95,035 under a high growth scenario<sup>1</sup>. It is important to note that Statistics Canada's annual population estimates by census metropolitan area show that the Halifax CMA population estimates are currently outpacing the high growth scenario of the 2009 Altus Group projections.

In fact, between 2006 and 2009, the only two counties in Nova Scotia that experienced growth in population were Halifax and Colchester, as the following exhibit shows.

<sup>1</sup> Source: Altus Group Economic Consulting. 2009. Employment, Population and Housing Projections – Halifax Regional Municipality: An Update.



**Exhibit 8 Population Growth – Nova Scotia Counties (1996-2009)**

Source: Estimates of Population, CANSIM 051-0052

According to the 2006 Census, the population of the Halifax Regional Municipality was 372,679 – a 3.8% increase from 2001 and 8.7% increase from 1996. Halifax is ranked number 13 nationally in terms of population size of census subdivisions (CSD) in Canada. Note that if the Greater Toronto Area (GTA) municipalities of Mississauga and Brampton were included with Toronto, Halifax would be ranked higher (see the following exhibit). The exhibit below also compares HRM with the rest of the major areas in Atlantic Canada, and finds that the next largest population areas in the Atlantic region are Cape Breton Regional Municipality, NS and St. John's, NF, which are ranked 47th and 48th nationally.

**Exhibit 9: Canadian Census Subdivisions by Population Counts, 2006**

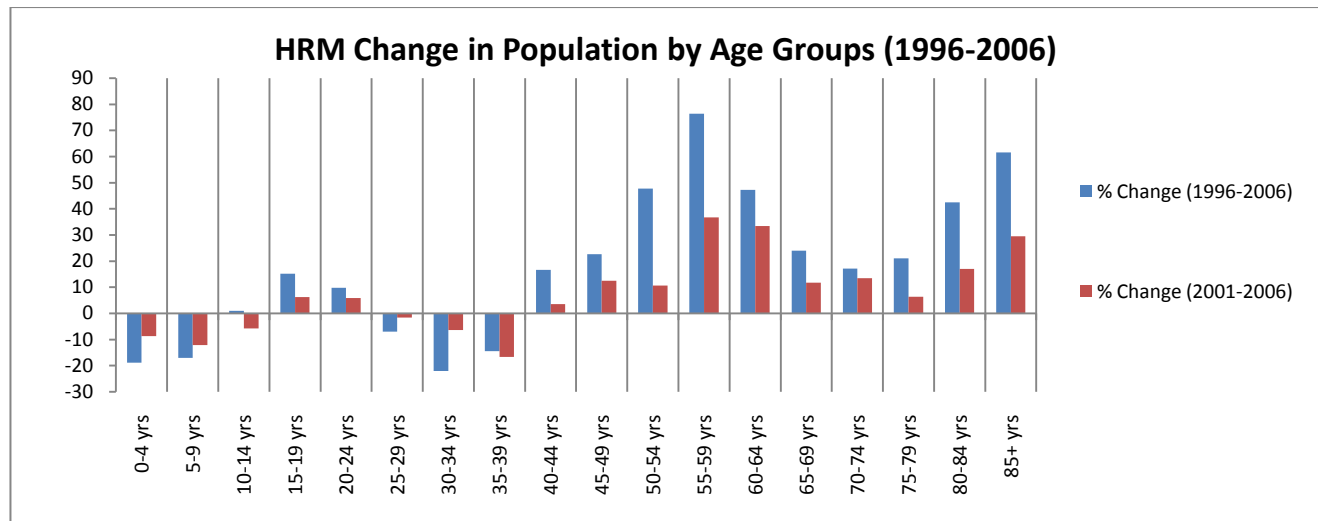
CSD National population rank, 2006	Geographic name	Population (2006)	Population growth/decline (%) - 2001-2006
1	Toronto (Ont.)	2,503,281	0.9
2	Montréal (Que.)	1,620,693	2.3
3	Calgary (Alta.)	988,193	12.4
4	Ottawa (Ont.)	812,129	4.9
5	Edmonton (Alta.)	730,372	9.6
6	Mississauga (Ont.)	668,549	9.1
7	Winnipeg (Man.)	633,451	2.2
8	Vancouver (B.C.)	578,041	5.9
9	Hamilton (Ont.)	504,559	N/A (error in 2001 counts)
10	Québec (Que.)	491,142	3.1
11	Brampton (Ont.)	433,806	33.3
12	Surrey (B.C.)	394,976	13.6
<b>13</b>	<b>Halifax (N.S.)</b>	<b>372,679</b>	<b>3.8</b>
47	Cape Breton RM (N.S.)	102,250	-3.5
48	St. John's (N.L.)	100,646	1.5
76	Saint John (N.B.)	68,043	-2.3
78	Moncton (N.B.)	64,128	5
92	Fredericton (N.B.)	50,535	6.2
126	Charlottetown (P.E.I.)	32,174	-0.2

Source: Statistics Canada. 2007. Population and Dwelling Count Highlight Tables. 2006 Census.

In Halifax Regional Municipality, the child population under 15 years old has been decreasing over a 10 year period from 1996 to 2006, as can be seen in the following exhibit. For example, the age group of 5 to 9 years old declined by 12.1% from 2001 to 2006. This represents a decline of over 2,700 children in the 5 to 9 years group from 2001 to 2006 and a total decline of 5,800 children under 15 years old from 2001 to 2006. Another indicator uses school registrations and corroborates this decline in school-age children in the HRM, as the data shows a loss of almost 3,200 children from 2006 to 2011<sup>2</sup> was experienced.

Decline in the young adult age groups in HRM – 25 to 39 years – also occurred from 1996 to 2006.

**Exhibit 10 HRM Change in Population by Age groups (1996-2006)**

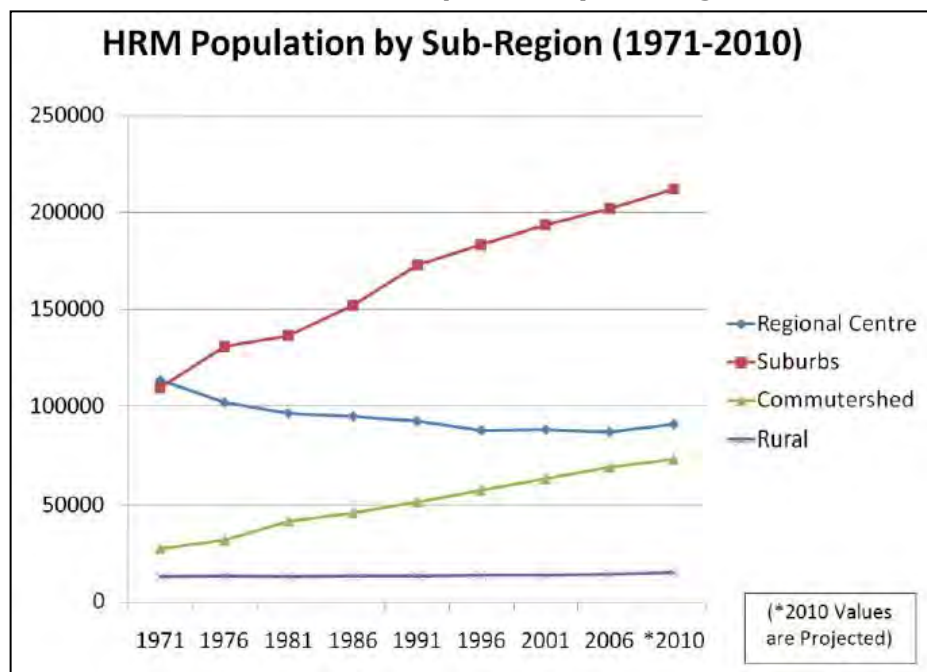


Source: Nova Scotia Community Counts web page - data modeled from Statistics Canada, Census of Population, 1991, 1996, 2001, 2006.

The median age in the Halifax Regional Municipality, according to the 2006 Census, was 39 years old - younger than the provincial median age of 41.8 in 2006 and younger than the other provincial median ages in Atlantic Canada. However, HRM is following the aging trend seen in the rest of the region, as the 55+ age groups have all experienced significant growth in the 10-year period from 1996 to 2006, as shown in Exhibit 10.

In terms of growth by sub-regions within HRM, the population in the suburbs has grown steadily from 1981 to 2010, whereas the regional centre has declined slightly during that same period.

<sup>2</sup> Source: HRM Long Term Arena Strategy Background Report Draft, March, 2011

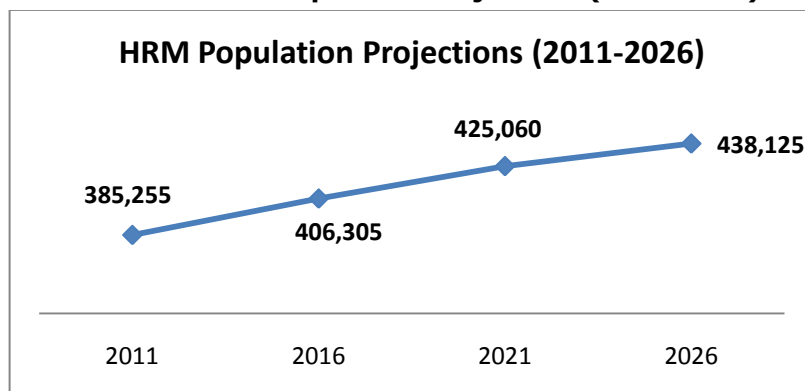
**Exhibit 11 HRM Population by Sub-Region**

Source: HRM. 2010. Capital Ideas - Leveraging Urban Investment for Regional Prosperity.

### HRM Population Projections

Population projections of HRM were conducted by Altus Group<sup>3</sup> in 2009, and under the baseline scenario, HRM will experience an increase of 65,280 people by 2026 – a total expected population of 438,125 people in 2026.

During 2001 to 2006, HRM had a sub-replacement fertility rate of 1.38. (The fertility rate is a figure showing the average number of children born per woman. The replacement level is 2.1, which represents the number of births required for long-term replacement of the population.) The total fertility rate of 1.38 in HRM is expected to continue until 2026. The social implication of sub-replacement fertility rates is an aging population.

**Exhibit 12 HRM Population Projections (2011-2026)**

<sup>3</sup> Source: Altus Group Economic Consulting. 2009. Employment, Population and Housing Projections – Halifax Regional Municipality: An Update.

Source: Altus Group Economic Consulting. 2009. Employment, Population and Housing Projections – Halifax Regional Municipality: An Update.

In terms of the future age structure of HRM, the cohort of children under the age of 15 is expected to see growth from 2016 to 2026 after a period of declining numbers from 2001 to 2011. Additionally, the aging of the population is clearly shown in the significant growth of the older age group of those aged 65 and older. Youth and young adults (15 to 29 years old) are expected to have negative growth from 2021 to 2026.

**Exhibit 13: Population Growth by Age Cohort, Halifax Regional Municipality, 2001-2026 (Baseline Scenario)**

Age Cohort	2001	2006	2011	2016	2021	2026
0-14	(2,270)	(5,800)	(2,872)	2,162	3,538	1,217
15-29	1,190	2,590	4,069	1,524	(2,756)	(3,081)
30-49	1,145	(2,590)	(5,571)	(34)	6,711	6,723
50-64	11,825	14,015	10,856	6,720	(484)	(4,397)
65+	4,330	5,435	5,926	10,678	11,747	12,604
Total	16,220	13,650	12,409	21,051	18,756	13,066

Source: Altus Group Economic Consulting. 2009. Employment, Population and Housing Projections – Halifax Regional Municipality: An Update

The following exhibit summarizes the population by age cohort in 2006 as compared to the population by age cohort under the baseline or medium growth scenario for 2026 as a share of the total population.

**Exhibit 14 Population by Age Cohort 2006 vs. 2026**

Age Cohort	2006 pop	Share of pop.	2026 pop.	Share of pop.	2006-2026 Incremental change
0-14	60,200	16.15%	64,245	14.66%	4,045
15-29	78,510	21.06%	78,265	17.86%	-245
30-49	117,590	31.54%	125,420	28.63%	7,830
50-64	71,570	19.20%	84,260	19.23%	12,690
65+	44,975	12.06%	85,925	19.61%	40,950
<b>Total Pop.</b>	<b>372,845</b>	<b>100.00%</b>	<b>438,115</b>	<b>100.00%</b>	<b>65,270</b>

Source: Altus Group Economic Consulting. 2009. Employment, Population and Housing Projections – Halifax Regional Municipality: An Update

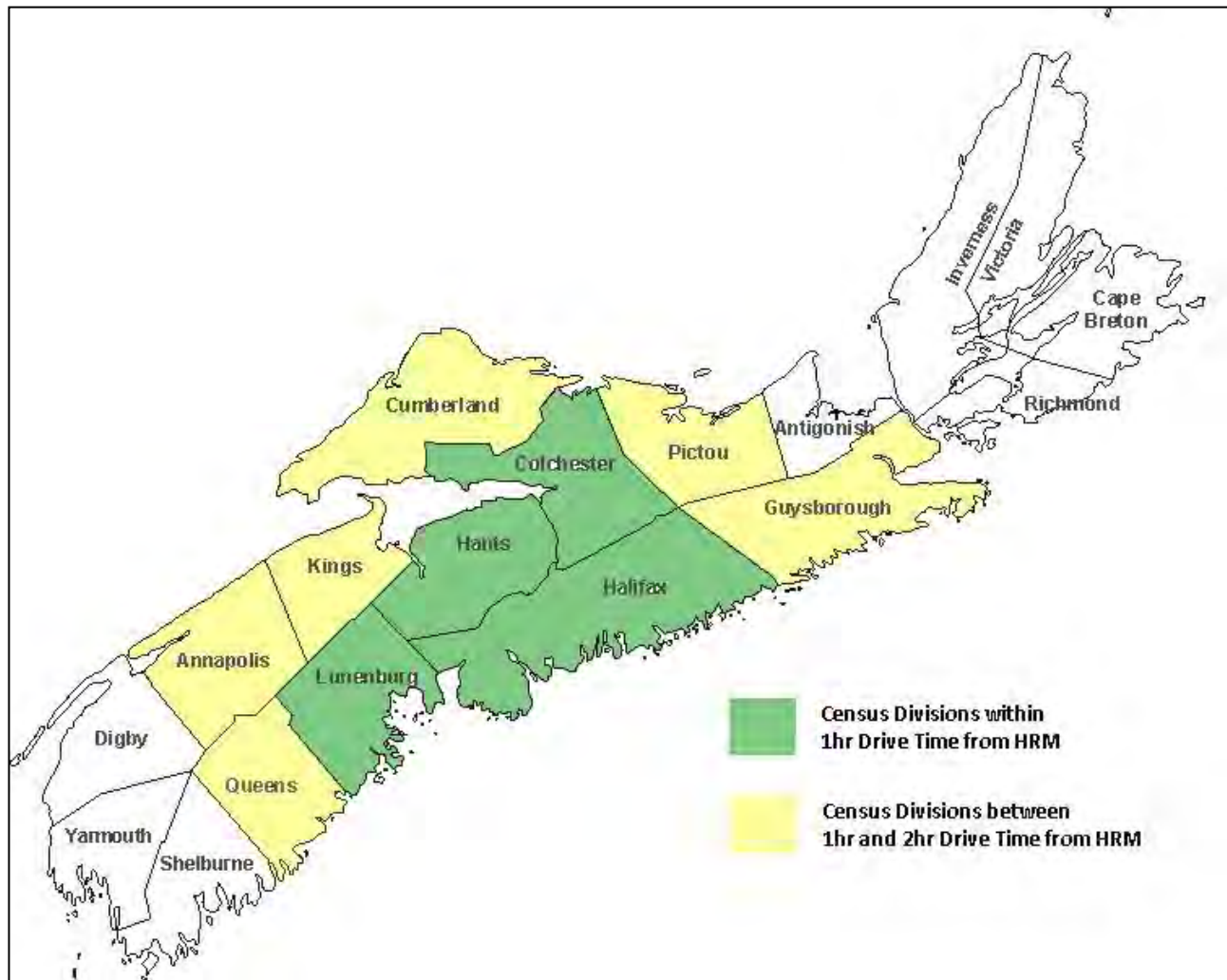
## Drive Time Analysis

An analysis of the population living within 1 hour and 2 hour drive times of Halifax Regional Municipality show that as of 2006, almost 515,000 people lived within a 1 hour drive time to HRM and an additional 180,000 between a 1 and 2 hours drive from HRM. Note that drive times are estimates based on Census Division boundaries which could be reached by 1 or 2 hour drive times from the Halifax Peninsula. The analysis shows that a significant concentration of the provincial population is located in and around the Halifax region and as distance from HRM increases, the incremental addition of population declines.

### Exhibit 15 Population of Census Divisions Within 1 and 2 Hour Drive Times of HRM

Census Divisions Within 1 Hour Drive Time	2006 Population
Halifax	372,858
Lunenburg	47,150
Hants	41,182
Colchester	50,023
<b>Total Population within 1 hour drive time</b>	<b>511,213</b>
Census Divisions between 1 hour and 2 hour drive time	2006 Population
Queens	11,212
Annapolis	21,438
Kings	60,035
Cumberland	32,046
Pictou	46,513
Census Divisions between 1 hour and 2 hour drive time	2006 Population
Guysborough	9,058
<b>Total Population between 1 hour and 2 hour drive time</b>	<b>180,302</b>
<b>Total Population within 2 hour drive time</b>	<b>691,515</b>

**Exhibit 16 Map showing Census Divisions within 1 and 2 hour drive times of HRM**



### 3 COMPARABLE STADIA IN NORTH AMERICA

#### Section Summary

- The landscape of stadia in Canada is diverse in size, function and focus.
- In Canada, there are 15 stadium facilities with permanent seat counts of 10,000 or higher.
- CMAs with population similar to that of HRM are geographically located in close proximity to regional economic hubs, and often lie within the geographic market catchment area for many of the spectator events hosted in these major cities.
- The core issues in determining facility scale are those of demand for spectator events, the opportunities for community-scale programming and accommodating future demands.
- Most current stadium developments are redevelopments of existing facilities undertaken in order to accommodate increased multi-use capacity or seat expansions, or to extend the lifecycle of aging facilities.
- Recent developments in Canada show a trend toward demonstrating the multi-use capacities of major stadia beyond the utility for a professional team.

#### 3.1 WHAT IS A STADIUM?

A stadium is loosely defined as a “large, usually roofless, building with tiers of seats for spectators at sports events” (Merriam-Webster Dictionary). Over time, characteristics of stadia have evolved to include a broad range of physical features and attributes serving a range of functions. While some stadia are roofless, some are enclosed (notably US examples) and some have retractable roofs. For others, often community level facilities, air supported domes or “bubbles” provide for continued use of the field during the off-season. While some stadia are large-scale spectator facilities designed and built specifically for one or several types of spectator entertainment, some are small community-use facilities, scaled to meet only the needs of the immediate community for viewing sports, community gatherings and other activities.

The landscape of stadia in Canada is diverse in size, function and focus. It includes iconic facilities such as the Rogers Centre, B.C. Place and, in its heyday, Montreal’s Olympic Stadium. In Canada, there are also a number of historic stadia developed over the years, and which host the Nation’s Canadian Football League (CFL) franchises. Very recently, several so-called “soccer-specific” stadiums have been constructed – BMO Field in Toronto and Saputo Stadium in Montreal. The Montreal Impact are the 19th MLS franchise and will compete in 2012, with an expanded stadium.












Beyond these venues, there are several facilities which are modest in size (in and around 10,000 seats), do not have a franchised sports team as an anchor, but which serve an important function to a range of users. These facilities provide for larger scale spectator events but also operate as community facilities; some are multi-use, some are less so. These venues serve a number of roles and are both regional and local in purpose.

At another, more local scale, there are a host of community facilities which include fields with permanent seating, are variable in quality, size of seating and level of amenities. This scale of venue does not meet the requirements of FIFA as it relates to hosting the 2015 Women’s World Cup of Soccer.

### What Types of Stadia are found in other Canadian Cities?

Represented below are active stadia located in Canadian municipalities with at least 10,000 permanent seats. Excluded are stadia designed specifically for baseball or tennis.

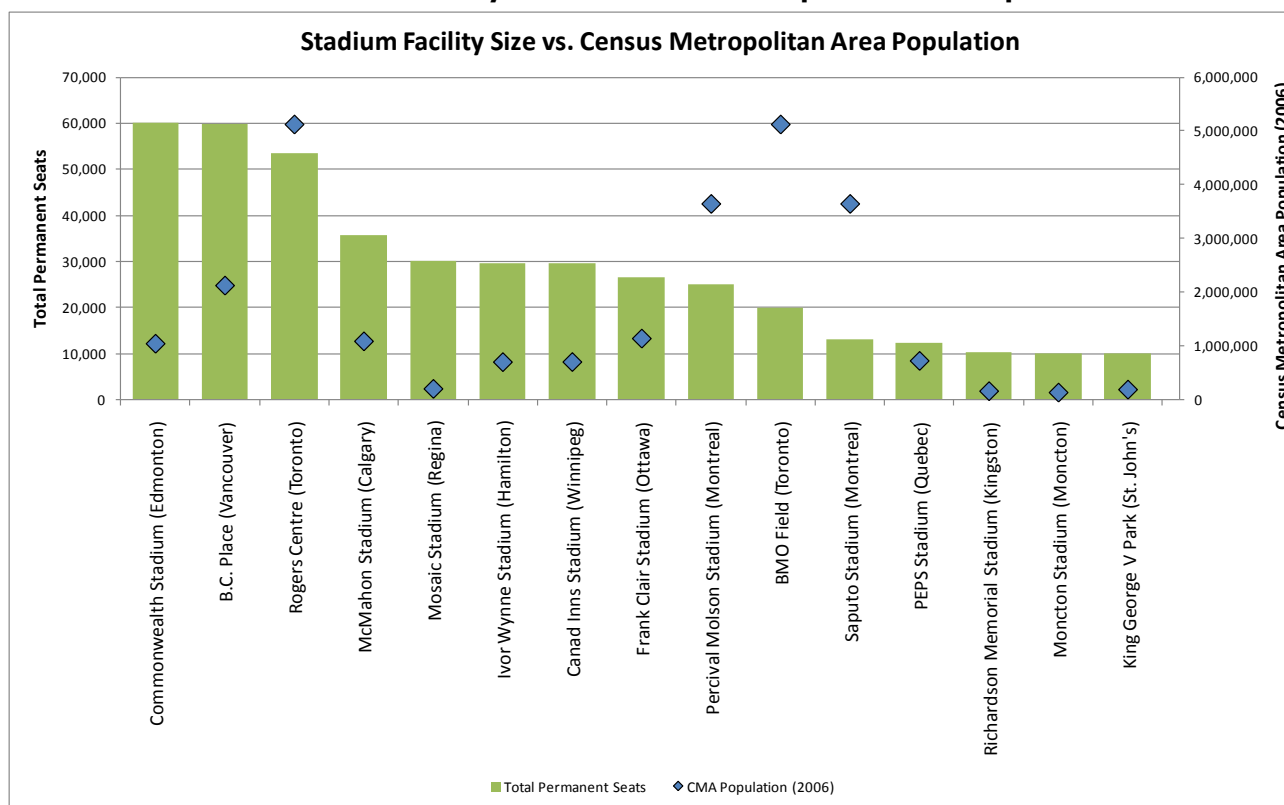
**Exhibit 17 Summary of Major Stadium Facilities in Canada**

Summary of Major Stadium Facilities In Canada				
Facility / Location	Year Opened	Total Permanent Seats	MLS Tenant	CFL Tenant
Commonwealth Stadium (Edmonton)	1978	60,081		
B.C. Place (Vancouver)	1983	59,841		
Rogers Centre (Toronto)	1989	53,506		
McMahon Stadium (Calgary)	1960	35,650		
Mosaic Stadium (Regina)	1927	30,048		
Ivor Wynne Stadium (Hamilton)	1930	29,600		
Canad Inns Stadium (Winnipeg)	1953	29,533		
Frank Clair Stadium (Ottawa)	1908	26,559		
Percival Molson Stadium (Montreal)	1919	25,000		
BMO Field (Toronto)	2006	20,000		
Saputo Stadium (Montreal)	2008	13,000 (expanding to 20,341 in 2012)		
PEPS Stadium (Quebec)	1994	12,257		
Richardson Memorial Stadium (Kingston)	1971	10,258		
Moncton Stadium (Moncton)	2010	10,000		
King George V Park (St. John's)	1925	10,000		

MLS = Major League Soccer, CFL = Canadian Football League

Stadium facility size is not directly related to the size of the (Census Metropolitan Area) population. It is dependent on a number of factors, often historical. Principal among these is the presence or otherwise of one of more sports franchises as anchor tenants. Whether the facility is housing a CFL team, soccer franchise or other tenants, determines the core design and minimum seating capacity, level of amenities and other attributes. In general terms, however, factors such as population of the market area, existence of competitive facilities, and the relative demand for spectator events are all determinants of the achievable scale of the facility.



**Exhibit 18 Stadium Facility Size vs. Census Metropolitan Area Population**

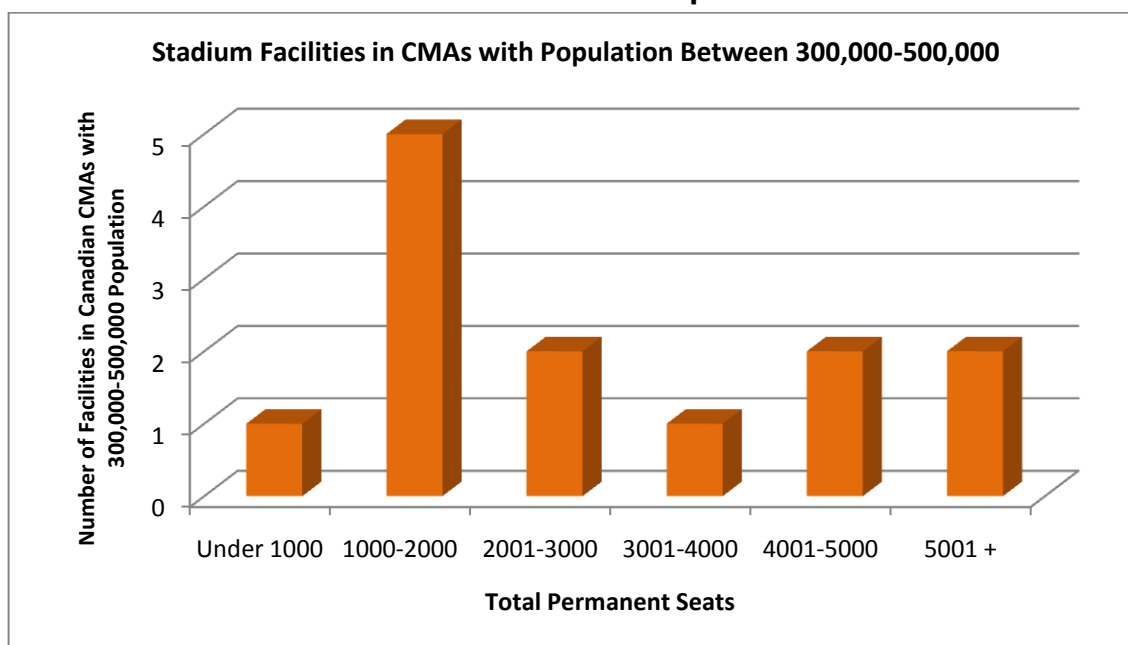
### What Types of Stadia are found in Cities of Similar Size?

Presented below is a summary of the stadium facilities located in Census Metropolitan Areas (CMAs) with a population similar to that of HRM. Canadian CMAs with a population of 300,000-500,000 and an illustrative list of their respective stadium facilities are summarized. Excluded are stadia designed specifically for baseball or tennis.

**Exhibit 19 Analysis of Stadium Facilities in CMAs with Population Between 300-500k**

<b>Analysis of Stadium Facilities in CMAs with Population Between 300,000-500,000</b>				
<b>Geographic Name</b>	<b>2006 CMA Pop.</b>	<b>Stadium Facility Name</b>	<b>Total Perm. Seats</b>	<b>Main Tenants</b>
<b>London, ON</b>	457,720	Cove Road Stadium	1,000	London City Soccer Team
		TD Waterhouse Stadium	8,000	Western Mustang and London Falcons Football Teams
<b>Kitchener, Cambridge, Waterloo, ON</b>	451,235	University Stadium	6,500	University of Wilfrid Laurier and University of Waterloo Football Teams
<b>St. Catharines-Niagara, ON</b>	390,317	Community Park	2,500	St Catharines Blue Jays Baseball Team
<b>Halifax, NS</b>	372,858	St Marys University - Huskies Stadium	4,000	St Marys Huskies Football Team
		Dalhousie - Wickwire Stadium	1,200	Dalhousie Tigers
<b>Oshawa, ON</b>	330,594	Oshawa Civic Stadium	2,000	Oshawa Hawkeyes
		Kinsmen Stadium	500	Oshawa Dodgers Baseball Team
<b>Victoria, BC</b>	330,088	Royal Athletic Park	4,247	Victoria Rebels Football Team
		Centennial Stadium	5,000	
<b>Windsor, ON</b>	323,342	University of Windsor Stadium	2,000	Windsor Lancers
		Windsor Stadium	3,000	Border Stars Soccer Team
		Essex Highschool Stadium	2,000	Essex Ravens

Stadia as defined by permanent seat count vary greatly in this grouping of cities and city-regions, with the largest at around 8,000 permanent seats. The majority of facilities in this group have 1000-2000 permanent seats. There are aberrations, an example of which is the 10,000 permanent seat capacity of the University of Moncton stadium, within a smaller CMA (Moncton CMA had a population of 126,424 in 2006). This is, in part, due to Moncton's large market area draw of approximately 400,000 within a 2 hour drive time.

**Exhibit 20 Stadium Facilities in CMAs with Population Between 300-500k**

It is important to note that a number the CMAs with population between 300,000 – 500,000 are geographically located in close proximity to regional economic hubs, and often lie within the geographic market catchment area for many of the spectator events hosted in these major cities (such as Toronto and Detroit). The geographic location of HRM is uniquely positioned in that it does not reside in the shadow of neighbouring major urban centre.

Focusing on population as a measure of achievable scale of any public spectator facility is, at best, a general reflection of other factors which together have determined the mandate, function, size and capital investment in these venues. The core issues are those of demand for spectator events, the opportunities for community-scale programming and accommodating future demands.

### 3.2 SPECTATOR STADIA CASE STUDY FINDINGS

In assessing the potential scale, uses, form, and operations of a stadium facility in HRM, the consulting team has studied various features of construction and operation of existing facilities found in North America. The following was considered in the selection of stadium facilities for review:

- Existing soccer-specific or Multiuse stadium facility;
- Case studies as a whole represent a variety of operating models;
- Focus on stadia with fixed seat counts under 30,000; and
- Highlight innovative partnerships in capital project development or operation.

A long list of stadia were considered for detailed review, however, the following 10 facilities represent the areas of focus for the case study exercise:

1. Moncton Stadium, Moncton;
2. BMO Field, Toronto;
3. Saputo Stadium, Montreal;
4. Percival Molson Stadium, Montreal;
5. Varsity Stadium, Toronto;
6. PEPS Stadium, Quebec City;
7. TD Waterhouse Stadium
8. King George V Stadium, St. John's;
9. Pizza Hut Park, Frisco, TX; and
10. Home Depot Center, Carson, CA.

Full details of each case study are available under separate cover in a document titled *“Phase 1 Stadium Analysis: Detailed Case Studies”*. A summary of the key facts pertaining to each facility are outlined in the following table. Where possible, the consultants have provided details of the inclusions and exclusions of capital cost figures.

Name, Location, Year Opened (or renovated)	Fixed Seating Capacity (Expanded Seating Capacity)	Capital Cost (Renovation Cost)	Operator	Owner	Key Uses	Key Features	Annual Operating Budget
Moncton Stadium, Moncton, NB, 2010	10,000 (20,725)	\$20 million Excludes land.	City of Moncton and University of Moncton	City of Moncton and University of Moncton	Track and field, football, soccer, major events hosting	Natural turf, 800-lane 400m track, removable cover for track for use during non-athletics events	NA
BMO Field, Toronto, ON, 2007	22,108	\$62.9 million Excludes land.	Maple Leaf Sports and Entertainment	City of Toronto	MLS Soccer, Canadian national soccer team, major events hosting, some community sports use	Natural turf, premium suites	\$7 million
Saputo Stadium, Montreal, QC, 2007 (2012)	13,034 (17,000) - expansion underway to 20,341 fixed seats	\$17 million (\$23 million expansion underway) Excludes land.	Saputo Stadium (incorporated non-profit)	RIO - Régie des Installations Olympiques	MLS Soccer, other soccer events hosting, team administrative offices	Natural turf, practice fields, partially covered seating, office space, corporate boxes	NA
Percival Molson Memorial Stadium, Montreal, QC, 1917 (2010)	25,000	(\$29.3 million)	McGill University and Alouettes CFL team	McGill University	CFL Football, University Football	Field Turf surface, 3-lane 400m track, corporate boxes	\$200,000-\$300,000 for utilities, maintenance, minor repair (excludes staffing, which is shared among multiple facilities)
Varsity Stadium, Toronto, ON, 1898 (2007)	5,000	(\$32.4 million)	University of Toronto	University of Toronto	University and community football, track and field, soccer, golf	Artificial turf field, 400m 8-lane track, air supported dome covering the field for winter usage, Pavilion has office space and team and therapy rooms	Operates at a loss. Costs \$340,000 annually for staffing (3 managers, 1 permanent staff, 11 part-time staff)

Name, Location, Year Opened (or renovated)	Fixed Seating Capacity (Expanded Seating Capacity)	Capital Cost (Renovation Cost)	Operator	Owner	Key Uses	Key Features	Annual Operating Budget
PEPS Stadium, Quebec City, 1994	12,257 (18,000)	Information Unavailable	Université Laval	Université Laval	University football, soccer, rugby, provincial tournaments	Artificial turf, 400m running track, part of PEPS complex	Approximately \$200,000, including an \$80,000 annual reserve fund
TD Waterhouse Stadium, London, ON, 2000	8,000 (16,000)	\$10.65 million Excludes land.	University of Western Ontario	University of Western Ontario	University football, track and field, soccer, community uses	FieldTurf, 8-lane 400m track, sandpits	Approximately \$350,000, including \$120,000 in staff costs
King George V Park, St. John's, NL, 1925 (2006)	6,540	\$3.6 million Unknown if land cost included.	St. John's Soccer Association	City of St. John's	St. John's Soccer Association	Field Turf, FIFA regulation size, change rooms, concession, boardroom	Operates with a surplus: costs are approximately \$80,000-\$100,000; revenues are between \$200,000-\$300,000. Surplus pays down mortgage on facility.
Pizza Hut Park, Frisco, TX, 2005	21,193 (28,000)	USD \$57 million Excludes land.	Frisco Soccer, LP (Hunt Sports Group)	City of Frisco	MLS soccer, high school football games, training, concerts and other major events	Natural turf, suites, permanent stage, private stadium club, pavilion and secondary field	NA
Home Depot Center Stadium, Carson, CA, 2003	27,000 (27,000)	USD \$95 million Unknown if land cost included.	Anschutz Entertainment Group	Anschutz Entertainment Group	MLS soccer	Natural turf, suites, partially covered seating, training fields adjacent to stadium	NA

Important themes and messages to be derived from this analysis are summarized below:

- Stadium facilities, in all cases where financial information is available, carry an annual deficit regardless of whether a stadium is located in a major urban centre or whether an anchor tenant is present.
- Recognizing that a deficit is likely in order, several facilities have found means to capture operational efficiencies through development of a “campus” or precinct of recreational facilities with shared management, staff and resources.

### 3.3 CURRENT STADIUM DEVELOPMENT IN CANADA

This section describes the current status, and rationale, related to stadia being or having recently been developed in Canada.

Most current stadium developments are redevelopments of existing facilities undertaken in order to accommodate increased multi-use capacity or seat expansions, or to extend the lifecycle of aging facilities. Recent developments in Canada show a trend toward demonstrating the multi-use capacities of major stadia beyond the utility for a professional team. There are several examples of football and soccer teams sharing use of stadium facilities.

Whether redeveloped or new, stadia are increasingly being tied to the revitalization of specific neighbourhoods, by linking the facility—and capital budgets—to broader development efforts that include residential, hotel, or other commercial developments. This is frequently a capital financing strategy whereby rights are sold for commercial and residential development in the vicinity of the new facility (or on the site of the stadium facility being replaced) in order to assist in financing the new or renewed facility.

Developments are also often occurring in multiple phases over 5-10 years, to allow ambitious projects to be realized through incremental improvements that are separately funded.

These examples also demonstrate that the federal government does not always fund stadium development projects, however the province, local municipality and at least one other partner are typically involved.

Project, Location	Description of Work	Anchor Tenants	Capital Cost and Expected Completion	Seating Capacity	Project Development Lead	Municipal/ Provincial/ Federal Contribution	Other Contributors	Key Rationale for Development
<b>Varsity Stadium, Toronto, ON</b>	NEW BUILD - Demolition of existing stadium, replacement of grandstands, addition of new artificial surface, purchase of winterized dome, new entry building for Varsity Stadium and Varsity Arena (Pavilion)	University teams	\$32.4 million (2009) Built on existing UofT land.	5,000	University of Toronto		University of Toronto, donations	Part of positioning University of Toronto as a leader in high performance sport research, sports medicine and athlete and coach development
<b>Percival Molson Memorial Stadium Renovation (Phase II), Montreal, QC</b>	RENOVATION - Seat expansion, audio system improvements, repositioning of video screen, addition of elevators, addition of public art	CFL, University teams	\$29.3 million (2010)	25,000	McGill University and Montreal Alouettes CFL team	Municipal and Provincial	Montreal Alouettes	Phase II of stadium upgrades
<b>BC Place Stadium, Vancouver, BC</b>	RENOVATION - New cable-supported retractable roof, flexible draping system, Infrastructure improvements, interior improvements, construction of hotel and casino adjacent to stadium	CFL, MLS	\$563 million (2011)	22,000 for soccer, 55,000 other events	PavCo	Provincial	70-year development agreement with Paragon Development Limited	Damage to roof, facility reaching end of life cycle

Project, Location	Description of Work	Anchor Tenants	Capital Cost and Expected Completion	Seating Capacity	Project Development Lead	Municipal/ Provincial/ Federal Contribution	Other Contributors	Key Rationale for Development
<b>Saputo Stadium, Montreal, QC</b>	RENOVATION - Seat count expansion, increasing number of corporate boxes, covered seats, concessions, additional stadium entrances, permanent boutiques	MLS	\$23 million (2012)	20,341	Saputo Stadium Incorporated	Provincial	NA	Increasing seat count and upgrading stadium in preparation for MLS expansion to Montreal
<b>New Winnipeg Blue Bombers Stadium</b>	NEW BUILD - Construction is underway for new football stadium on University of Manitoba Campus to have partially covered seating.	CFL, University teams	\$190 million (2012) Multi-year lease of UofM lands.	33,000 (expandable to 40,000)	Winnipeg Football Club	Municipal, Provincial and Federal	Retail development of current stadium site as regional shopping centre	Existing facility (Canad Inns Stadium) is aging despite having undergone several renovations
<b>Frank Clair Stadium, Ottawa, ON</b>	RENOVATION - Project includes renovation of the stadium, upgrades to Civic Centre, new restaurants, shops, a pavilion, farmer's market, seating areas and onsite parking, housing development. Phase I work includes franchise start-up costs, stadium and infrastructure, parking garage, retail, cinema and infrastructure	CFL team (to be purchased), university teams	\$247.3 million in Phase I (2013)	24,000	Ottawa Sports and Entertainment Group	Municipal	Ottawa Sports and Entertainment Group	Revitalization of Lansdowne Park; City received unsolicited proposal for redevelopment
<b>Ivor Wynne Stadium, Hamilton, ON</b>	RENOVATION - Demolition of one set of stands and reconstruction of seating, plus extensive renovations of other stand, addition of parking spots	CFL, potential to attract professional soccer team	\$152 million (2014)	25,000	City of Hamilton	Municipal and Provincial	HostCo (Pan Am Games), CFL team corporate sponsorship assistance	Use of the facility for Pan Am Games and retention of CFL football team



Project, Location	Description of Work	Anchor Tenants	Capital Cost and Expected Completion	Seating Capacity	Project Development Lead	Municipal/ Provincial/ Federal Contribution	Other Contributors	Key Rationale for Development
<b>New Stadium Complex, Regina, SK</b>	NEW BUILD - "Regina Revitalization," to include retail and condo development of recently vacated CP lands, construction of new 'entertainment complex' for CFL team and other arts, culture, entertainment, trade, amateur and professional sports uses, demolishing of existing stadium, 700 new units of residential to be developed on the site of the existing Mosaic Stadium	CFL	\$1 billion (2015) Preliminary and unknown if land cost is included.	TBD	City of Regina, Province of Saskatchewan	Municipal and Provincial (Federal TBD)	TBD	Existing facility considered to be past its life cycle and in need of significant investment

### **Varsity Stadium, Toronto, ON (new high performance centre projected to be complete in 2013)**

In an effort to establish the University of Toronto as a leader in high performance sport research, sports medicine and coach and athlete development, a multi-phase project to renew and redevelop the Varsity Stadium and adjoining spaces and facilities was undertaken in 2002. The original stadium was becoming expensive for the University of Toronto to run.

An important consideration for University of Toronto administration was that the renewed facility be made usable year-round. To this end, a winterized bubble was added which allows for several new uses for the space, including a driving range. The bubble is erected each year in November and dismantled in May.

The project began with demolition of the existing stadium and was completed in 2007 with replacement of the grandstands, addition of a new artificial surface to the playing field, and purchase of the winterized dome at a total cost of \$22.9 million, financed by the University of Toronto. In 2009, a \$9.5 million new entry was completed leading to both the Varsity Stadium and Varsity Arena. This portion of the project was financed through donations.

A final piece of work, a \$58 million high performance centre with teaching and training facilities, is currently in a fundraising phase and is expected to be complete in 2013. Thus far \$30.5 million in philanthropic donations have been secured.

### **Molson Percival Stadium (renovation recently completed), Montreal, QC**

In 2003, the Montreal Alouettes and McGill University jointly devised a multi-year plan to bring the facility up to standard. The plan began with a \$13.3 million Phase 1 project funded through federal, provincial, and municipal contributions. This project involved replacing the old field surface with new Field Turf and renovating the areas under two of the grandstands, including dressing rooms, showers, officials' rooms. Concessions and washrooms were also expanded, new lighting was installed, and a significant project was undertaken to improve access roads to the stadium.

A second phase of work began in 2009, at a cost of \$29.3 million, and funded by the Province of Quebec, the City of Montreal, and the Montreal Alouettes. In this phase, 5,000 seats were added to the Stadium, bringing the total capacity to 25,000. In addition, improvements were made to the audio system, public art was added and features such as addition of elevators and repositioning of the video screen were completed.

The renewed stadium is used by the Montreal Alouettes, university teams, and for recreational purposes by university students and community members.

### **BC Place Stadium Renovation (projected to open in September 2011), Vancouver, BC**

Prompted in part by damage sustained in 2009 to the existing roof, \$365 million in upgrades to BC Place Stadium were initially approved including interior improvements, the addition of a retractable cable-supported roof, infrastructure improvements, and a flexible draping system. The cost of the redevelopment has since increased to \$563 million for the entirety of the project which includes construction of an adjacent hotel and casino. The project is being primarily financed by PavCo, the provincial crown corporation that operates BC Place, through cash reserves, sponsorships, and a 70-year development agreement with Paragon Development Limited.

Paragon Development Limited will build a 680,000 square foot entertainment complex, including two new hotels and a gaming facility to replace the existing Casino. PavCo, the City of Vancouver, and the Province, will receive annual revenues from this lease agreement.

The new facility will be used by the local CFL football and MLS soccer teams. While the BC Place Stadium seats a total of 55,000 for soccer, the capacity will be reduced to 22,000 through the use of a flexible draping system that will make the facility appear much more intimate. Moveable loge boxes will bring audience members right down to floor level.

The notion of a stand-alone soccer specific stadium for Vancouver has been contemplated in the past, and designs were drawn for a 20,000-seat stadium to be located in the Gastown district. At this time, the MLS club has stated its commitment is to BC Place and plans for a soccer-specific stadium have been put on hold.

### **Saputo Stadium Expansion (projected to open in 2012), Montreal, QC**

The Saputo Stadium is the home of the Montreal Impact, which will soon join the Major League Soccer organization. The stadium, which cost \$17 million to build, opened in 2008. The construction cost was entirely privately funded with \$9.5 million donated by the Saputo family and the remainder financed through a 25-year loan guaranteed by the Saputo family. It currently seats 13,034 with the ability to expand to 20,000.

Four years after its opening, the stadium is being upgraded and its fixed seating increased to 20,341 in preparation for 2012, when the Major League Soccer expands to Montreal. The renovation, which is costing \$23 million, is being paid for by the Province of Quebec.

In addition to the seat count increase, other improvements include increasing the number of corporate boxes from 16 to 40, increasing the number of point of sale concessions from 27 to 100, expanding the number of entrances to the stadium from 2 to 3, and the addition of a cantilever roof and of two permanent boutiques. Work is expected to be complete by March 2012.

While specifics on how the new fixed seat count number was arrived at are unavailable, MLS soccer stadia in the U.S. and Canada have fixed seating capacities between 18,500 and 27,000 with an average of about 21,000 fixed seats.

### **New Winnipeg Blue Bombers Stadium (projected to open in June 2012), Winnipeg, MB**

The Winnipeg Blue Bombers currently play at the 29,500-seat Canad Inns Stadium. Built in 1953, the facility has undergone several renovations but is perceived to be aging. The Stadium is managed by the Winnipeg Blue Bombers' ownership, Winnipeg Football Club, which took over from a city board—Winnipeg Enterprises—when it was dissolved in 2004.

Construction is currently underway for a new 33,000-seat football stadium to be located adjacent to the existing University Stadium. Anchor tenants will be CFL team Winnipeg Blue Bombers as well as the University of Manitoba football team Manitoba Bisons. Some seats will be covered by a partial roof. The seating capacity will be expandable to 40,000 with temporary seating.

The project has had several setbacks including changes to the proposed design and cost overruns.

The \$190 million facility (whose price was initially pegged at \$135 million) will be supported through federal and provincial funding (totalling \$35 million). The City will contribute \$12.5 million. Profits from

retail development of the current stadium site (through a 650,000 sq. ft. regional shopping centre) will form the remainder of the capital dollars required to undertake the project.

The Government of Manitoba is providing most of the upfront capital, which includes a \$85 million loan to the Winnipeg Football Club, repayable over 44 years. The City will also repay the Province for its investment through property tax payments from the site that will be redeveloped.

### **Frank Clair Stadium Redevelopment (projected to open in June 2013), Ottawa, ON**

Ottawa's 40-acre Lansdowne Park is located along the Rideau Canal. The Frank Clair Stadium was constructed there in 1908, and was joined by the Civic Centre Arena in 1967.

In 2008, the City of Ottawa received a proposal from the OSEG (Ottawa Sports and Entertainment Group) to revitalize Lansdowne Park. The proposal included the renovation of the Stadium, installation of a roof, addition of a restaurant, renovations to the Arena, construction of retail, residential, office and hotel space, and the development and operation of an aquarium.

Under the proposal, the City of Ottawa would pay for capital improvements to the Civic Centre and Frank Clair Stadium, but the OSEG would assume responsibility for ongoing operations of the facilities. OSEG proposes to pool its various business units so that the overall net operating income will be positive. OSEG agrees to underwrite the loss to any of the entities. If the project generates a surplus, the cash would be distributed to:

- Repayment of the Ottawa contribution;
- Maintenance/operating reserve;
- Return on investment for retail development; and
- Sharing of additional revenues between business units (teams and buildings) and the City.

OSEG's unsolicited proposal—the Lansdowne Partnership Plan—was submitted in late 2008 and was approved in principle by City council in November 2009. In June 2010, staff reported back with results of the financial and legal terms of the project, and the integrated master site plan was approved in November 2010. The final plan includes renovations to the Frank Clair Stadium and upgrades to the Civic Centre arena, new restaurants, shops, a pavilion, farmer's market, seating areas and onsite parking. There is also a significant housing development component to the plan. Construction is scheduled to begin in 2011 and be completed in 2013.

The new Stadium will have 24,000 seats, 26 corporate boxes, a FieldTurf field surface, and 4 locker rooms. It will be designed with multiple uses in mind in order to accommodate professional, university and community sports such as soccer, lacrosse and football, as well as other events such as concerts.

The City will provide \$106.2 million toward construction of the arena and stadium, plus \$23.1 million toward the parking garage. In addition, \$35 million will go toward an urban park, and \$8.5 million will go to a new trade show and exhibition space, for a total investment of \$172.8 million.

The City will contribute \$10.2 million from the sale of air rights on the residential component of the plan. The bulk of the City's share of the project, however, will be covered through long term debt which will require \$7.2 million in annual payments. In return, the City will no longer be required to spend the \$3.8 million annual it currently spends to operate Lansdowne Park. Revenues will come from the new commercial and retail property taxes to be generated by the redeveloped Park. Some revenues will also

come from the parking, commercial development and programming of the new site, though these will take longer to be realized.

OSEG is contributing \$118 million toward the purchase of sport franchises (OHL and CFL) and building the retail component of the project, mostly through issuance of long-term debt, plus an initial contribution of \$19.2 million.

The rationale for the multi-use perspective and campus perspective is that the whole complex should produce positive results even though particular units within it might not. For instance, the CFL team might not generate a net surplus, but the OHL team would, evening out the entire proposal.

The City's rationale for buying into the plan included:

- The City will no longer need to spend money to maintain aging infrastructure at Lansdowne Park;
- Ottawa will benefit from having a new stadium without increasing property taxes;
- City will no longer be assuming operating risks for the stadium or arena; and
- City will only retain operating risks for the urban park and programs such as the Ottawa Farmers' Market.

Recently, it was confirmed that Empire Theatres will open a 10-screen theatre complex in Lansdowne Park in 2013.

#### **Ivor Wynne Stadium Renovation (projected to open in 2014), Hamilton, ON**

The City of Hamilton was included in Toronto's bid to host the Pan Am Games in 2015. Both a velodrome and a stadium will be constructed in Hamilton for the events. The Stadium project has received a great deal of press due to negotiations with the Hamilton Tiger-Cats CFL football team regarding the site of the stadium.

After many discussions and the threat of losing the Pan Am Stadium project to another community, the decision was made to renovate the Ivor Wynne Stadium. Work is slated to begin in 2012 and be completed in 2014. The work will involve demolition of one set of stands and complete reconstruction of the 15,000 seats, plus extensive renovations of the other 10,000 seat stand. New parking spots will also be created.

The projected cost of the renovation is \$152 million. The City of Hamilton will provide \$54 million, the Host Corporation will provide \$70 million, and provincial funding will include a recent addition of \$22.5 million. The Hamilton Tiger Cats CFL team also has corporate sponsors who have committed to assist in the project, but has not confirmed whether the ownership will itself make a contribution to the capital project.

The CFL team has agreed to a 20-year lease of the renewed facility. The facility will allow for soccer uses in addition to football, and there is interest in attracting a professional soccer team to the facility following the Pan Am Games.

#### **New Stadium Complex (projected to open in 2015), Regina, SK**

The Mosaic Stadium in Regina is used by several football teams: the CFL team Saskatchewan Roughriders, the University of Regina Rams and Regina Thunder. It is also used for high school football. This is a 31,000 seat facility located near downtown Regina adjacent to Evraz Place, a fairgrounds and sports, exhibitions and convention centre. The facility is almost one hundred years old and is considered to be past its life cycle, in need of millions of dollars in investment. It is owned by the City of Regina, who then leases the stadium to the Saskatchewan Roughriders CFL Football team. Terms of the lease guarantee the City a

minimum percentage of team profit or a fixed amount (whichever is greater), but the City remains responsible for repair and maintenance of the facility.

In February 2010, a plan for a 45,000-seat, \$431 million downtown multipurpose facility with a retractable roof was revealed that would replace the aging Stadium. (The current Mosaic Stadium is considered to have a slightly smaller seat count than what would be ideal for the CFL team—they would like about 33,000 seats.) The Province through its Crown Investments Corporation then began to seek out funding for the Centre, and early partners included a hotel consortium that committed to providing \$10 million over a period of 15 years. However, the federal government did not agree to help fund the project. In addition, City of Regina and Province of Saskatchewan did not agree to take on additional debt in order to finance the project.

Since ‘status quo’ was not perceived to be an option, the Province began to review the parameters of the project, and stated that a new concept would need to be developed, which might involve a covered stadium, an open air facility, or renovations to the existing stadium.

As of April 20, 2011, the project has been expanded to a downtown revitalization project, dubbed ‘Regina Revitalization’. The first phase of revitalization would involve development of CP lands which have recently been vacated, to include retail, commercial and condo development, as well as an entertainment complex to house the Saskatchewan Roughriders and other uses anticipated to include: “arts, culture, entertainment, trade, and amateur and professional sports.” In phase 2, the existing Mosaic Stadium would be demolished and 700 new units of residential development would take its place.

The anticipated opening date for the new complex is 2015. A new agency, Regina Revitalization Inc. will be set up to implement the vision.

At this time it is anticipated that the City and Province will each contribute up to \$250 million to a \$1 billion revitalization project. For the time being, three full-time staff members operating out of the City Manager’s office will be exclusively focused on further defining the objectives and governance for the initiative, and then implementing the plans. An initial \$500,000 split equally between the Province and the City has been allocated to this preliminary work.

## 4 HRM STADIUM MINIMUM SPECIFICATIONS

The following section outlines the required minimum standard for hosting of the FIFA 2015 Women's World Cup, a Canadian Football League franchise and a Major League Soccer franchise. The specifications and considerations provided are the result of interviews with league representatives and other key informants as well as venue design guidelines. The specifications listed below speak primarily to seating capacity and field of play requirements and does not represent an exhaustive list of stadium specifications.

### FIFA 2015 Women's World Cup

In order to host the FIFA 2015 Women's World Cup event, a minimum of 20,000 total seats are required, with 10,000 seats being permanent. With regard to field of play, a minimum pitch size of 125m x 80m, with soccer markings of 105m x 68m is required. No visible Canadian football markings or advertising are permissible and natural grass or FIFA approved (Two Star) artificial turf surface is acceptable.

Based on our understanding, the minimum seating requirement to host future FIFA or CONCACAF events and tournaments are summarized by the following:

- Women's events require a minimum of 10,000 permanent seats, with the ability to expand to 20,000 seats;
- Men's events require a minimum of 20,000 permanent seats; and
- World Cup events require upwards of 50,000 permanent seats.

Events such as Friendlies would require compliance with minimum seating capacity as stipulated by the Canadian Soccer Association. In general, minimum seating requirements for such events are summarized by the following:

- Women's events require a minimum of 10,000 permanent seats, with the ability to expand to 20,000 seats;
- Men's events require a minimum of 20,000 permanent seats; and
- Youth events require fewer than 10,000 permanent seats.

### Canadian Football League (CFL)

In order to accommodate a Canadian Football League franchise, the following specifications and league preferences must be considered:

- A minimum of 25,000 permanent seats are required;
- In order to host a Grey Cup event, the capacity to expand to 40,000 seats is required;
- All field dimensions should be uniform and according CFL requirements which generally include:
  - The overall length of the field (goal areas included) from the inside of one deadline to the inside of the other deadline shall be 150 yards (137.16m);
  - The length of the field of play from the field side of one goal line to the field side of the other goal line shall be 110 yards (100.58m);
  - The width of the playing field from the inside of one sideline to the inside of the other sideline shall be 65 yards (59.4m); and
  - The length of the goal area from the field side of the goal line to the inside of the deadline shall be 20 yards (18.3m);

- Artificial turf fields are recommended due to the weather and maintenance issues in maintaining natural grass fields;
- Turf fields should be planned with a consideration of mixed use requirements, such as soccer, lacrosse, rugby;
- Track & field configurations are not compatible for the League's desire to create an intimate seating bowl; and
- Facility design is encouraged to consider secondary revenue streams.

### **Major League Soccer (MLS)**

In order to accommodate a Major League Soccer franchise, the following specifications and league preferences must be considered:

- A minimum of 18,000 permanent seats is required;
- MLS recommends that seating is located as close to the field as possible to create an intense and intimate atmosphere in the stadium, therefore, inclusion of a running track on the inside of the stadium is strongly discouraged. The preferred viewing distance is 492 feet (150m) from the furthest point of play;
- MLS requires a natural grass playing surface. In conditions where this is not practical, any permanent artificial surface used must meet Category 4 FIFA standards;
- MLS requires the playing field to accommodate a playing area of 225 feet (68.6m) in width and 360 feet (109.7m) in length. This will allow the facility to host MLS Special Events (e.g. Championship and All-Star Games), Soccer United Marketing events and FIFA competitions. However, MLS playing areas can range between 210 - 225 feet (64 – 68.6m) width and 330 - 360 feet (100.5 – 109.7m) in length; and
- A downtown location is preferred.



## 5 RECREATION, SPORT TRENDS AND OPPORTUNITIES

### Section Summary

- Soccer is a popular sport in the Canada and continues to experience a steady increased in popularity. Provincially, soccer is the field sport with the highest number of registered members/player. In HRM, soccer is the sporting activity with the most facility usage hours.
- It is anticipated that as sports participation in field and turf sports continues to grow in the region, most sporting associations will require additional facilities in the near to medium term to meet the needs of growing membership.
- Halifax has a number of strengths as a base for a CFL franchise including status as a principal corporate and financial centre in Atlantic Canada, a moderate population in the immediate region, significant hosting infrastructure and lack of competition.
- The MLS league is currently focusing franchise expansion on the US market.

It is important to note that at the time of writing of this report, a professional sporting franchise in Football or Soccer has not been established in HRM. Therefore the stadium business plan is predicated on the assumption that a professional sporting franchise would not anchor the facility at the outset of operations, rather, community usage and events would become the primary uses and revenue streams associated with the facility. In our research, formal conversations were held with professional sporting organizations MLS and CFL to understand the viability and possibility of establishing a professional sporting franchise in Halifax Regional Municipality.

### 5.1 PROFESSIONAL SPORTING FRANCHISE OPPORTUNITIES

#### Near-Term Market Opportunities for a CFL Franchise in HRM

CFL franchises exist primarily in major cities with major population bases and capacity for corporate sponsorship. Existing CFL Franchises and the facilities in which they are housed are as follows:

Facility / Location	CMA Population (2006)	Year Opened	Total Permanent Seats
Commonwealth Stadium (Edmonton)	1,034,945	1978	60,081
B.C. Place (Vancouver)	2,116,581	1983	59,841
Rogers Centre (Toronto)	5,113,149	1989	53,506
McMahon Stadium (Calgary)	1,079,310	1960	35,650
Mosaic Stadium (Regina)	194,971	1927	30,048
Ivor Wynne Stadium (Hamilton)	692,911	1930	29,600
Canad Inns Stadium (Winnipeg)	694,668	1953	29,533
Percival Molson Stadium (Montreal)	3,635,571	1919	25,000
Lansdowne Park (Ottawa)	1,130,761	2012	24,000

The readmission of a franchise based in Ottawa will take effect for the 2012 season. The addition of a franchise in the 2 hour drive time of the HRM market area would have a market area of 691,515 population as of 2006.

Any franchise developed in Atlantic Canada would represent the single Atlantic Canada team in the CFL for the foreseeable future, and while this would likely extend the market area capture, the overall distribution of the population is a limiting factor in supporting a team – spread, as it is over 4 provinces.

HRM has a number of strengths as a base for a CFL franchise including:

- Status as principal corporate and financial centre in Atlantic Canada;
- Moderate population base in the immediate region;
- Presence of significant hosting infrastructure, international airport, and retained wealth in the Province; and
- Lack of competition – unlike similar sized markets in Ontario and elsewhere, an existing franchise does not exist in the East and hence there is no potential for cannibalization of markets.

These attributes are important to the success of a franchise whose revenue model is based primarily on ticket sales plus significant secondary sources of revenue from the corporate market and from advertising.

Expansion in the east is a stated aim of the CFL contingent on the viability of a franchise being demonstrated and its contribution to the overall health and wellbeing of the league in financial terms. Even in the absence of an existing business case for a franchise in Atlantic Canada, the League recognizes the qualitative benefits of a league that is geographically national in reach.

Models which have been utilized for CFL franchises are varied and include:

1. Private ownership; and
2. Community ownership.

In terms of the business arrangements with a hosting facility, while some models have included the franchise as an investor in the facility through capital contributions in exchange for facility management rights, the traditional base business model is a lease arrangement with the facility. In the case of HRM, it is likely that any viable CFL franchise would operate, at least initially, as a tenant in a facility with seating capacity of 24,000-25,000 seats already constructed.

### **Near Term Market Opportunities for an MLS or NASL Soccer Franchise**

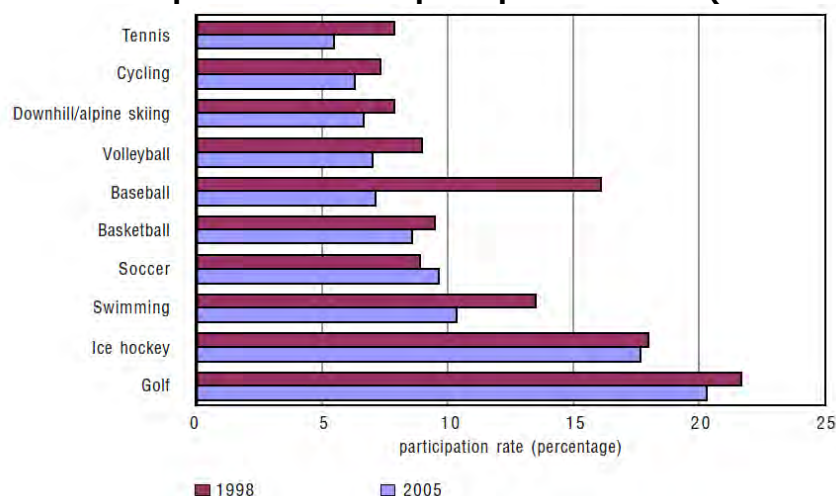
Based on research and interviews conducted, the Major League Soccer (MLS), has recently undertaken expansion – the addition of the Montreal Impact for the 2012 season. The intentions of the League are to focus on the US market in the near term with the potential for an additional franchise located in the North East US. Should potential for a MLS soccer franchise become available in the Canadian market, the preference of the league is for a stadium facility of 18,000 permanent seats (minimum), a natural grass playing surface and a location in a downtown area or urban core.

The consulting team attempted to contact the NASL on several occasions in the course of conducting this study but have thus far been unable obtain the opinion of the League as to the merits of the Atlantic Canadian Market and HRM in particular.

## 5.2 POPULAR SPORTS IN CANADA

According to the 2005 General Social Survey (presented in the Statistics Canada 2005 Sport Participation in Canada report), Baseball has dropped in popularity from 1998 to 2005 whereas soccer has gained more prominence. In 1998, baseball was one of the top three sports, but fell to sixth place in 2005. In the same period, soccer went from seventh place to fourth overall with 708,000 participants aged 15 and over in 2005. Among the top 10 sports in 2005, soccer is the only sport that has shown an increase in the participation rate from 1998-2005 (see following exhibit). In 2005, Golf is the most popular sport with a 20.3% active participation rate – which translates into almost 1.5 million Canadians – followed by Hockey. The other Top 10 sports can be seen in the exhibit below:

**Exhibit 21 Participation Rates in Top 10 Sports – Canada (1998 & 2005)**



Source: Statistics Canada. Sport Participation in Canada, 2005.

As shown in the table below, gender also plays a part in the choice of sport, as women preferred swimming, golf, soccer, volleyball and downhill skiing, and men were drawn to ice hockey, golf, basketball, soccer, and baseball.

**Exhibit 22 Top 10 Most Practised Sports by Canadians, 2005**

	Population Aged 15 & Over			Overall Participation Rate (%)	Active Participation Rate		
	Total	Male	Female		Total	Male	Female
	Thousands				Percentage		
<b>Total population</b>	<b>26,106</b>	<b>12,867</b>	<b>13,239</b>				
<b>Total Participants</b>	<b>7,314</b>	<b>4,568</b>	<b>2,745</b>		<b>100</b>	<b>100</b>	<b>100</b>
<b>1. Golf</b>	1,487	1,153	334	5.7	20.3	25.2	12.2
<b>2. Ice Hockey</b>	1,298	1,182	116	5	17.7	25.9	4.2
<b>3. Swimming</b>	764	252	513	2.9	10.4	5.5	18.7
<b>4. Soccer</b>	708	400	309	2.7	9.7	8.8	11.3
<b>5. Basketball</b>	626	445	181	2.4	8.6	9.7	6.6
<b>6. Baseball</b>	520	351	170	2	7.1	7.7	6.2
<b>7. Volleyball</b>	513	210	304	2	7	4.6	11.1
<b>8. Skiing (downhill/alpine)</b>	490	267	223	1.9	6.7	5.8	8.1
<b>9. Cycling</b>	459	283	177	1.8	6.3	6.2	6.4
<b>10. Tennis</b>	403	237	166	1.5	5.5	5.2	6.0

Source: Statistics Canada. Sport Participation in Canada, 2005.

### 5.3 A PROFILE OF SOCCER IN NORTH AMERICA

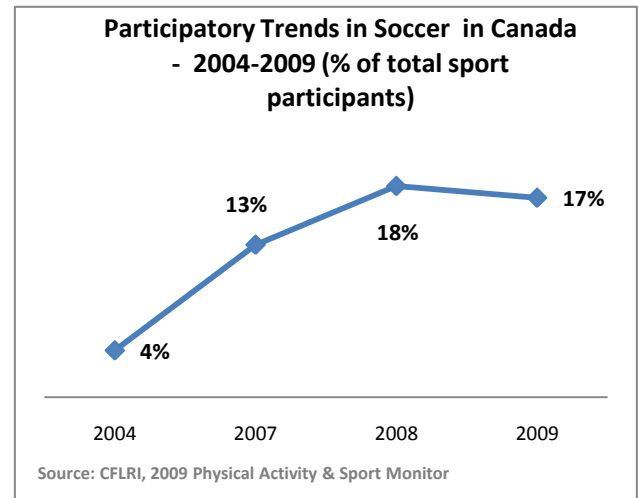
The game of soccer is a popular sport in North America. The remainder of this section provides an objective analysis of the profile of soccer in North America in terms of scale, growth and structure.

The main data sources cited in this section includes membership data in the 2008 Canadian Soccer Association (CSA) Demographic Report; the 2004 and 2007-2009 data contained in the Physical Activity and Sport Monitors gathered by the Canadian Fitness and Lifestyle Research Institute (CFLRI); and the membership data collected from the 2011 Phase 1 Stadium Analysis Consultation Questionnaire.

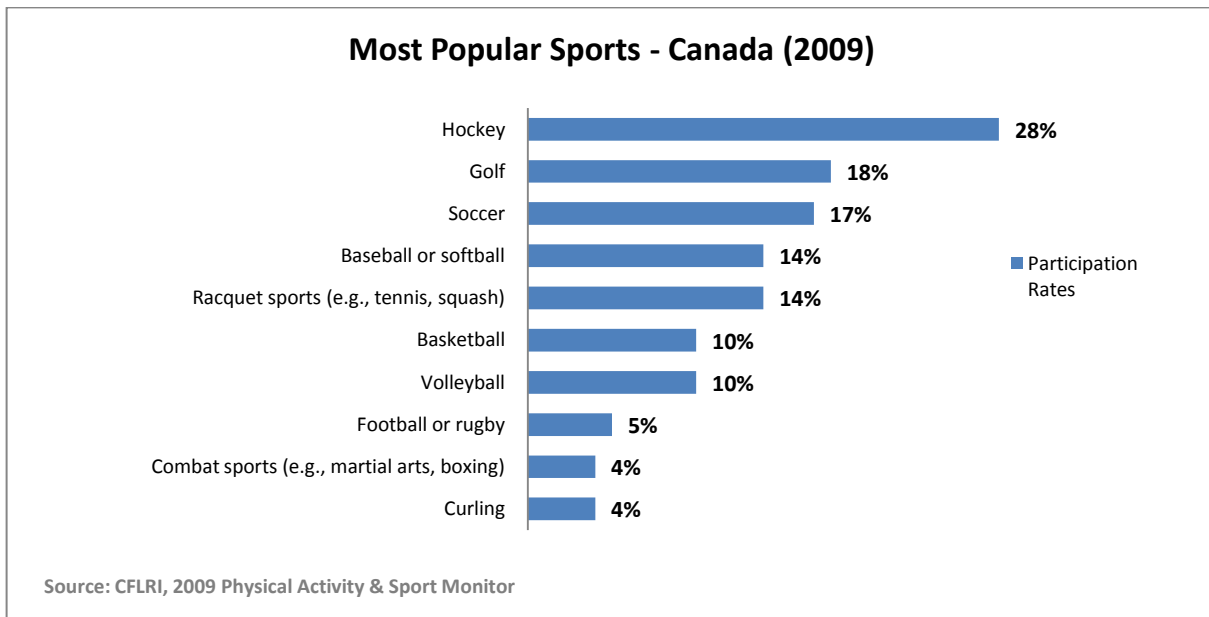
Soccer has grown in popularity in Canada since 2004 (see Exhibit 23) and is the number one sport for children aged 5 to 14<sup>4</sup>. Over 44% of active children played soccer in Canada in 2005<sup>5</sup> – which roughly translates into over 777,000 children.

Amongst adults in Canada (15 years and older), Soccer is the third most popular sport in the country and has steadily increased in popularity from 2004 to 2009<sup>6</sup>. In 2004, only 4% of those who participated in sport played soccer, but that level of participation grew to 17% in 2009.

**Exhibit 23 Participatory Trends in Soccer**



**Exhibit 24 Most Popular Sports in Canada (2009)**



<sup>4</sup> Source: Statistics Canada. Sport Participation in Canada, 2005.

<sup>5</sup> Source: Statistics Canada. Sport Participation in Canada, 2005.

<sup>6</sup> Source: 2009 Physical Activity and Sport Monitor published by the Canadian Fitness and Lifestyle Research Institute (CFLRI)

The following table shows popular sports in Canada by age group in 2009. Soccer shows to be popular amongst those aged 18 to 24 and is tied with Hockey as the number one sport activity in that age group.

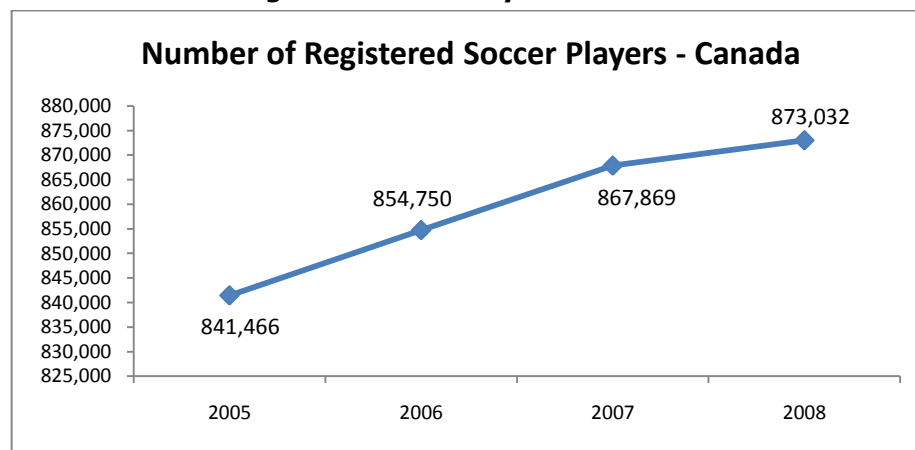
**Exhibit 25 Popular Sports in Canada by Age Group**

Popular Sports in Canada by Age Group, 2009					
18—24		25—44		45—64	
Hockey	30%	Hockey	36%	Golf	36%
Soccer	30%	Baseball/softball	19%	Hockey	19%
Basketball	19%	Soccer	15%	Racquet sports	15%
Volleyball	15%	Golf	14%	Baseball/softball	13%
		Racquet sports	12%	Curling	10%
		Volleyball	11%		
		Basketball	8%		

Source: CFLRI, 2009 Physical Activity & Sport Monitor

According to the Canadian Soccer Association, there were over 873,000 registered soccer players in 2008 in Canada. The registration numbers across the country have steadily increased since 2005, as shown in the following exhibit. From 2005 to 2008, the growth rate was 3.75%. The number of registered players in Nova Scotia has remained relatively stable in the same period.

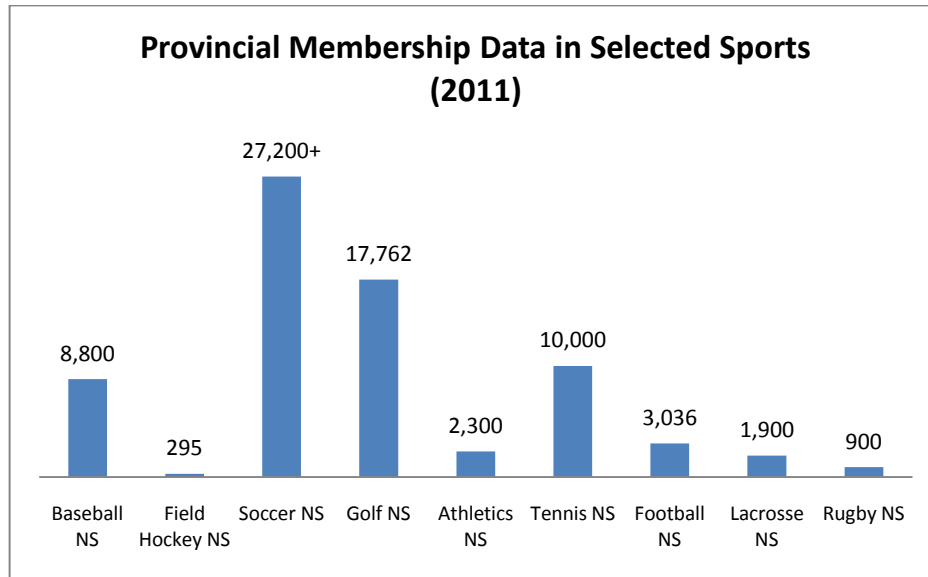
**Exhibit 26 Registers Soccer Players in Canada 2005-2008**



Source: 2008 Canadian Soccer Association (CSA) Demographics Reports

Soccer Nova Scotia reports that there are currently over 27,200 members in the province, and an estimated 50% of members are from Halifax Regional Municipality. Registration numbers for soccer are high relative to other sports in Nova Scotia. For comparative purposes, there were 24,000 registered hockey players in Nova Scotia in 2009 according to Nova Scotia Health and Wellness.

As part of the Phase 1 Stadium Analysis, the consulting team created a questionnaire to solicit input from relevant provincial sporting organizations in Nova Scotia. According to membership data collected from these questionnaires, it appears that soccer is the field sport in the province with the highest number of members/players, as shown in the following exhibit.

**Exhibit 27 Provincial Membership Data in Selected Sports (2011)**

Source: Membership data collected from 2011 Phase 1 Stadium Analysis Consultation Questionnaire

It is important to note that membership data of provincial sporting organizations is not necessarily indicative of the level of participation in a given sport, but represents the number of registered players of that sport.

Notwithstanding, soccer as a registered sport has been showing growth nationally, provincially and locally. The development of a stadium facility in the region should seek to compliment the growing needs of field sports in the region and elevate the level of competition and pride in participants.

### **Governance and Structure of Soccer in Canada and Nova Scotia**

FIFA (Fédération Internationale de Football Association) is the international governing body for soccer and is comprised of 208 national associations. FIFA organizes the men and women's World Cup, which occurs every four years.

The Canadian Soccer Association (CSA) is a FIFA member and is the governing body of soccer in Canada. CSA oversees the men's and women's national teams and organizes the national championships and Nutrilite Canadian Championship. CSA is also part of the Confederation of North, Central American and Caribbean Association Football (CONCACAF), the continental governing body for association soccer. CONCACAF runs the Gold Cup, a regional competition between the member national teams.

Soccer Nova Scotia (SNS) is a provincial member of the Canadian Soccer Association and governs soccer in Nova Scotia. It helps promote and manage indoor and outdoor soccer in Nova Scotia and oversees the Nova Scotia Soccer League and the Halifax Soccer League.

### **Professional Soccer Leagues in Canada**

The MLS (Major League Soccer) is the top professional soccer league in North America and two Canadian teams currently play in the league: Toronto FC and Vancouver Whitecaps. In 2012, the Montreal Impact soccer team will join the league, moving from the North American Soccer League, a professional men's league in North America and Puerto Rico. The Canadian Soccer League is also a professional soccer league in Canada and features a First Division of 14 teams and a Second Division. The United Soccer Leagues

Premier Development League (PDL) is the top level amateur league of the United Soccer Leagues in North America and Bermuda and currently has 9 Canadian teams. The soccer league pyramid below shows the hierarchy of the leagues.

### Exhibit 28: Soccer League Pyramid in Canada



Source: Canadian Soccer Pyramid, Wikipedia

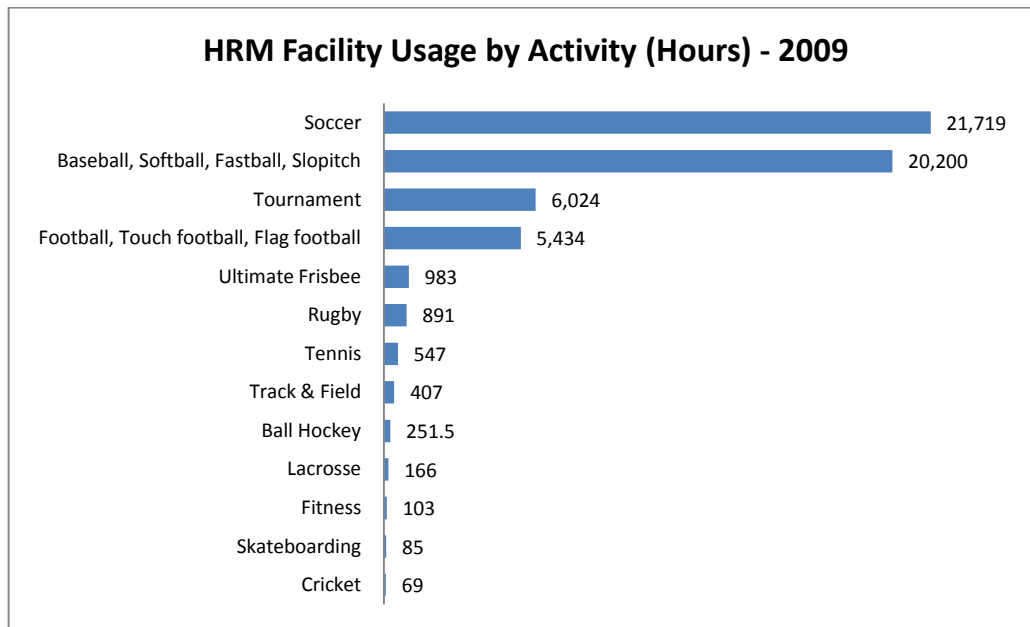
## 5.4 OTHER FIELD SPORTS

The feasibility of a potential stadium facility in HRM does not rest solely on soccer events and participation. Consideration of the accommodation of multiple uses within the facility is important. In that regard, the following section will discuss the governance structure, leagues and participation levels in other field sports including Football, Rugby, Field Hockey and Field Lacrosse.

In general, the Canadian sport system is composed of a network of organizations that deliver sport programming and services at the national, provincial/territorial and municipal levels. National organizations are members of international federations that establish the rules and regulations of the sport, and provincial sports organizations are generally members of the national groups.<sup>7</sup> University sports in Atlantic Canada come under the banner of Atlantic University Sport, a regional member organization of Canadian Interuniversity Sport.

The following exhibit shows the facility usage by activity in hours in HRM in 2009. Amongst field sports, soccer was the activity with the most facility usage hours in 2009, followed by baseball/softball and football.

<sup>7</sup> Source: Sport Canada website (<http://www.pch.gc.ca/pgm/sc/mssn/org-cdn-eng.cfm>)

**Exhibit 29 HRM Facility Usage by Activity (Hours) - 2009**

Source: Sierra Planning & Management based on Halifax Regional Municipality Community Planning Department

## Football

Football Canada is the national governing body of amateur football in Canada, which includes tackle, touch and flag football. Football Nova Scotia is the governing body for Football in the province and the Halifax Gridiron Football Association – known as Halifax Football – organizes teams for the various leagues in the Spring and Fall Tackle program and Spring Flag Football. The Nova Scotia Schools Athletic Federation governs the High School Football League in the province.

Currently, there are over 3,000 football players in the province with over 2,200 participants in the Central region, according to Football Nova Scotia. The majority of participants are in the Minor Tackle League. Historic membership data provided by Soccer Nova Scotia shows that total registered football membership in the province experiencing an increase in the order of 35% annually (the growth of membership from September 2008-August 2010 was over 700). It is important to note that Football Nova Scotia has articulated a need for additional access to turf fields as the current complement of fields is insufficient to meet demand.

The Canadian Football League (CFL) is the professional sports league for Canadian football, and has eight teams in two divisions. Currently, there is no CFL team in the Atlantic provinces – the most eastern team is based in Montreal. However, university football is played at Saint Mary's University.



## Rugby

According to Rugby Nova Scotia, there are currently approximately 900 members in the province and about 50% of their members reside in HRM. Rugby Canada is the national governing body and Rugby Nova Scotia is the provincial governing body. There are two clubs in HRM:

- **Halifax Rugby Football Club (RFC):** runs two senior men's team in the First and Second divisions and a women's team in the First division and a junior team in the Metro Halifax Junior Rugby league; and the
- **Halifax Tars:** fields women's and men's teams in Division 1 and 2.

## Field Lacrosse

There are currently 1,900 members of Field Lacrosse in Nova Scotia, according to the Lacrosse Nova Scotia Society, the governing body of amateur lacrosse in the province and a member of the national governing body, Canadian Lacrosse Association. Canadian University Field Lacrosse Association oversees inter-collegiate lacrosse in Canada, and teams are located in Ontario and Quebec.

The following are Halifax-based associations of Lacrosse Nova Scotia:

- Halifax Northwest Rebels Lacrosse;
- Eastern Shore Minor Lacrosse; and
- Halifax Hurricanes Lacrosse Association.

Based on discussions with representatives from the Lacrosse Nova Scotia Society, the majority of their members are box lacrosse players while approximately 200 members play field lacrosse. Notwithstanding, membership in field lacrosse is experiencing growth.

## Field Hockey

The governance structure of field hockey follows that of other sports, in that Field Hockey Canada is the national governing body for the sport and Field Hockey Nova Scotia oversees the sport provincially.

There are currently 295 members (55 men and 240 women) with the majority of members located in HRM, according to Field Hockey Nova Scotia. The provincial sports organization expects to increase their membership by 5 to 10% annually over the next three years. Field Hockey Nova Scotia organizes indoor and outdoor leagues for athletes of various skill levels and there are five clubs in HRM.

## Athletics

Athletics Nova Scotia is the provincial governing body – an affiliate of Athletics Canada – and its mandate is to promote and develop track & field, road running and cross country running in Nova Scotia. Currently, its membership numbers 2,300 people, but is projected to grow to 2,700 by 2012 based on recent growth numbers. About 40% of members are estimated to be in HRM, and continued growth in membership is anticipated particularly in HRM, Cape Breton and Yarmouth, according to Athletics Nova Scotia.

In terms of appropriate facilities and venues, HRM does not have the capacity to accommodate a track and field competition above the provincial championship level thereby limiting efforts to attract national or international events.

## Tennis

An affiliate of Tennis Canada, Tennis Nova Scotia helps promote and grow the sport in the province. There are 35 member clubs and over 10,000 members in Nova Scotia.

Tennis Nova Scotia is proposing a tennis centre in HRM based on need and support for additional tennis facilities in Halifax Regional Municipality. The proposal involves a 10-court tennis facility with eight of these courts covered for year round play. It is expected that this facility would service 800 to 1,000 frequent players, as well as thousands of other participants through schools' programs, tournaments, clinics and special events.

The rationale behind this community tennis centre is based on a Tennis Canada supported a survey, which suggests that HRM could support a construction of 40 indoor tennis courts. Currently, only four temporary courts exist at Northcliffe in the Halifax Regional Municipality, and the future of those courts is uncertain.

A participation survey conducted by the Sports Manufacturers Association of Canada in March, 2009, showed that tennis has grown by 43 per cent from 2000 to 2008, making it the highest growth sport in the country. One of the greatest challenges that tennis faces in keeping up with the growth and popularity of the sport is providing accessible, affordable facilities.

### Demonstrated Need for Additional Facilities

It is evident through the review of participation trends of various field and turf sports that membership in all sports, according to provincial sporting organizations, is growing. The immediate need for new and additional facilities have been expressed by a number of sporting groups and it is anticipated that as sports participation continues to grow in the region, most sporting associations will require additional facilities in the near to medium term to meet the needs of growing membership.

## 6 THE OPPORTUNITIES

### 6.1 PARTICIPATORY OPPORTUNITIES AND DAILY PROGRAMMING

The Stadium is expected to generate the potential for hosting a significant number of provincial and Atlantic regional events which are currently occurring in the region. A number of these can be expected to be annual occurrences at the stadium.

Based on the illustrative list of events in Exhibit 30 which could be hosted, the average number of events days for a range of sports tournaments and championship games could be in the order of 50 event days.

Almost all of these events have some degree of spectator capacity, however, some are very modest. For these, the economic impacts associated with the participation and family members travelling to HRM is more significant. While this generates below the line returns to HRM from its investment in the stadium, it doesn't add revenue to the facility itself. There are also likely to be stadium hosting costs associated with these essentially limited spectator events. The assessment of revenues and expenses as part of this business plan assumes that there is likely a net cost to the facility in terms of necessary fixed costs associated with any level of event hosting, while direct programming costs are passed through to the event organizers (the PSOs and others) who may also operate events with a volunteer base in addition to stadium staff.

The major ticketed events are limited – while a number exist annually, the competition for the stadium is the rest of Canada and in some case internationally as well.

### 6.2 SPECTATOR AND PARTICIPATORY EVENT OPPORTUNITIES BY SPORT

The Halifax Regional Municipality Event Strategy with the vision to “promote the vibrant, active and dynamic interest of HRM citizens and visitors through a diverse calendar of signature events which complement and enhance the individual and collective experience”, outlines 3 primary goals, and objectives for events in HRM:

Goal	Objectives
1. <b>Strengthen Event Leadership</b>	<ul style="list-style-type: none"> <li>• Acknowledge the value and importance of events</li> <li>• Engage event stakeholders</li> <li>• Improve event research</li> <li>• Coordinate government assistance</li> </ul>
2. <b>Enhance Event Impact</b>	<ul style="list-style-type: none"> <li>• Increase event sector capacity</li> <li>• Improve event quality</li> <li>• Improve event infrastructure</li> </ul>
3. <b>Expand HRM's Event Calendar</b>	<ul style="list-style-type: none"> <li>• Maintain and develop existing recurring events</li> <li>• Develop new unique and complementary events</li> <li>• Host high-profile, quality international events</li> <li>• Improve event grand and contribution services</li> </ul>

There is a clear desire to grow the events market in HRM and to ensure that the type and scale of events continues to meet the growing and changing needs of the population. Based on our understanding of the events market in HRM as well as industry and key informant insight, a stadium facility of 10,000 - 20,000 seats represents the necessary infrastructure to enable the municipality to compete for national and international events which have not been given consideration simply due to lack of hosting infrastructure. The following analysis provides an illustrative view of the type and scale of events and tournament which could be hosted at a stadium facility in HRM.

In order to develop a realistic list of potential spectator events which could be hosted at a stadium in HRM, the consulting team first compiled a list of annual available events based on internet research, discussions with various sporting organizations and key informants. It is important to note that the list is not exhaustive and is meant to inform a discounted list of illustrative annual event potential at a stadium in HRM between the years 2015-2025. The findings of this exercise are summarized in the following exhibit, a full list of available events are appended to this document (Appendix C).

### Exhibit 30 Annual Event Potential

Annual Event Potential		
	Annual Events Provincial, Regional and National Events participant-based in nature	Special Events Regional, National and International Events spectator-based in nature
<b>Soccer</b>		
Estimated Annual Available Events:	<b>38</b>	<b>16</b>
Example Events:	<ul style="list-style-type: none"> <li>• Sony U-18 Cup</li> <li>• Atlantic Championships</li> <li>• NSSAF Championships</li> </ul>	<ul style="list-style-type: none"> <li>• FIFA Events</li> <li>• CONCACAF Events</li> </ul>
<b>Football</b>		
Estimated Annual Available Events:	<b>13</b>	<b>1</b>
Example Events:	<ul style="list-style-type: none"> <li>• Flag Football National Championships</li> <li>• NSSAF Football Championships</li> </ul>	<ul style="list-style-type: none"> <li>• Uteck Bowl</li> </ul>
<b>Rugby</b>		
Estimated Annual Available Events:	<b>5</b>	
Example Events:	<ul style="list-style-type: none"> <li>• AUS Championships</li> <li>• ACAA Championships</li> </ul>	
<b>Lacrosse</b>		
Estimated Annual Available Events:		<b>2</b>
Example Events:		<ul style="list-style-type: none"> <li>• World Lacrosse Championships</li> <li>• Lacrosse World Cup</li> </ul>
<b>Field Hockey</b>		
Estimated Annual Available Events:	<b>4</b>	
Example Events:	<ul style="list-style-type: none"> <li>• CIS Championships</li> <li>• National Championships</li> </ul>	

Multi-Sport and Other Events		
<b>Estimated Annual Available Events:</b>	<b>4</b>	<b>11</b>
<b>Example Events:</b>	<ul style="list-style-type: none"> <li>• NSSAF Cheerleading Championships</li> <li>• University Convocations</li> </ul>	<ul style="list-style-type: none"> <li>• World Masters Games</li> <li>• Pan American Games</li> <li>• Military World Games</li> </ul>
<b>Total Annual Available Events</b>	<b>64</b>	<b>30</b>

Several of the events listed in the table consist of multiple event days, ranging from 1 up to 14 day events. Also important to note that special events listed primarily represent international events which are either hosted on a rotational basis or awarded by a bidding process, therefore, the anticipated event schedule discounts the expected frequency of capture of such events.

Derived from the comprehensive list of potential events, an understanding of the rotational schedule of several international and national events as well as the potential for hosting in Halifax Regional Municipality, this report develops an illustrative annual event schedule for a potential stadium in HRM from 2015-2025.

The following rationale has been applied in the determination of a potential events schedule:

- A high percentage of Provincial events specific to Nova Scotia will be hosted at the stadium;
- Several national championships will be hosted at the facility each year;
- Occasional international event hosting is possible and realistic given the will and leadership to bid on competitive international events; and
- The analysis excludes events related to athletics as these events should only be considered where adjacent track and field facilities are included. This option is presented as an opportunity if the development of the stadium proceeds on lands sufficiently large to accommodate an adjacent grass field and IAAF sanctioned track.

### Exhibit 31 Illustrative Annual Events Schedule for a Stadium Facility in HRM

	2015	2016	2017	2018	2019	2020
Soccer	CSA Challenge Trophy	CSA National Team Event	CSA National Team Event	CSA Jubilee Trophy	CSA Challenge Trophy	CSA East Masters Competition
	CSA National Team Event	CSA East Masters Competition	CSA East Masters Competition	CSA National Team Event	CSA National Team Event	CSA East Masters Competition
	Sony U-18 Cup	CSA East Classics Competition	CSA East Classics Competition	CSA East Masters Competition	Sony U-18 Cup	CSA East Classics Competition
	CSA East Masters Competition	CSA U-16 Cup	CSA U-14 Cup	CSA East Classics Competition	CSA East Masters Competition	CSA U-16 Cup
	CSA East Classics Competition	Atlantic U-15 Championships	Atlantic U-14 Championships	Atlantic U-13 Championships	CSA East Classics Competition	Atlantic U-15 Championships
	Atlantic U-16 Championships	Tier 1 U-14 Provincial Championships	Tier 1 U-14 Provincial Championships	Tier 1 U-14 Provincial Championships	Atlantic U-16 Championships	Tier 1 U-14 Provincial Championships
	Tier 1 U-14 Provincial Championships	Tier 1 U-16 Provincial Championships	Tier 1 U-16 Provincial Championships	Tier 1 U-16 Provincial Championships	Tier 1 U-14 Provincial Championships	Tier 1 U-16 Provincial Championships
	Tier 1 U-16 Provincial Championships	Tier 1 U-18 Provincial Championships	Tier 1 U-18 Provincial Championships	Tier 1 U-18 Provincial Championships	Tier 1 U-16 Provincial Championships	Tier 1 U-18 Provincial Championships
	Tier 1 U-18 Provincial Championships	CIS Men's Soccer Championships	Nutriline All Stars	NSSAF JV Soccer Championships	Tier 1 U-18 Provincial Championships	CIS Men's Soccer Championships
	CIS Women's Soccer Championships	ACAA Men's Championships	NSSAF JV Soccer Championships	NSSAF Division 1-5 Boys Championships	CIS Women's Soccer Championships	CONCACAF Champions League
	NSSAF JV Soccer Championships	ACAA Women's Championships	NSSAF Division 1-5 Boys Championships	NSSAF Division 1-5 Girls Championships	ACAA Men's Championships	NSSAF JV Soccer Championships
	NSSAF Division 1-5 Boys Championships	NSSAF JV Soccer Championships	NSSAF Division 1-5 Girls Championships	Soccer NS Provincials	ACAA Women's Championships	NSSAF Division 1-5 Boys Championships
	NSSAF Division 1-5 Girls Championships	NSSAF Division 1-5 Boys Championships	Soccer NS Provincials	Military World Cup - Mens	NSSAF JV Soccer Championships	NSSAF Division 1-5 Girls Championships
	Soccer NS Provincials	NSSAF Division 1-5 Girls Championships	CCAA Soccer National Championship - Men's	Military World Cup - Womens	NSSAF Division 1-5 Boys Championships	Soccer NS Provincials
	FIFA Women's World Cup	Soccer NS Provincials	CCAA Soccer National Championship - Women's		NSSAF Division 1-5 Girls Championships	
			CONCACAF U-17 Championship		Soccer NS Provincials	
Football	St. Mary's Regular Season Football	St. Mary's Regular Season Football	St. Mary's Regular Season Football	St. Mary's Regular Season Football	St. Mary's Regular Season Football	St. Mary's Regular Season Football
	NSSAF Football Championships	Flag Football National Championships U-16 Male	NSSAF Football Championships	Vanier Cup	National Flag Football Championships U-15 Co-ed	Loney Bowl
	Loney Bowl	Flag Football National Championships U-18 Male	AUS Men's Football Championships	Flag Football National Championships U-16 Female	NSSAF Football Championships	
		Loney Bowl	Loney Bowl	Flag Football National Championships U-18 Female	Loney Bowl	
		Uteck Bowl	AUS Women's Football Championships	Uteck Bowl		
			Loney Bowl			
Rugby	NSSAF Rugby Championships			NSSAF Rugby Championships		
Lacrosse						
Field Hockey	Field Hockey Canada National Championships Field Hockey Canada Under 16 Championbships					CIS Women's Field Hockey Championships
Total Annual Events	18	21	22	20	22	17

	2021	2022	2023	2024	2025
<b>Soccer</b>	CSA East Masters Competition CSA East Classics Competition CSA U-14 Cup Atlantic U-14 Championships Tier 1 U-14 Provincial Championships Tier 1 U-16 Provincial Championships Tier 1 U-18 Provincial Championships NSSAF JV Soccer Championships NSSAF Division 1-5 Boys Championships NSSAF Division 1-5 Girls Championships Soccer NS Provincials CCAA Soccer National Championship - Men's CCAA Soccer National Championship - Women's	CSA Jubilee Trophy CSA East Masters Competition CSA East Classics Competition Atlantic U-13 Championships Tier 1 U-14 Provincial Championships Tier 1 U-16 Provincial Championships Tier 1 U-18 Provincial Championships Nutralite All Stars ACAA Men's Championships ACAA Women's Championships NSSAF JV Soccer Championships NSSAF Division 1-5 Boys Championships NSSAF Division 1-5 Girls Championships Soccer NS Provincials CONCACAF Women's U-20 Championship	CSA Challenge Trophy Sony U-18 Cup CSA East Masters Competition CSA East Classics Competition Atlantic U-16 Championships Tier 1 U-14 Provincial Championships Tier 1 U-16 Provincial Championships Tier 1 U-18 Provincial Championships CIS Men's Soccer Championships CIS Women's Soccer Championships NSSAF JV Soccer Championships NSSAF Division 1-5 Boys Championships NSSAF Division 1-5 Girls Championships Soccer NS Provincials	CSA East Masters Competition CSA East Classics Competition CSA U-16 Cup Atlantic U-15 Championships Tier 1 U-14 Provincial Championships Tier 1 U-16 Provincial Championships Tier 1 U-18 Provincial Championships CIS Men's Soccer Championships World Military Women's Championship NSSAF JV Soccer Championships NSSAF Division 1-5 Boys Championships NSSAF Division 1-5 Girls Championships Soccer NS Provincials	CSA East Masters Competition CSA East Classics Competition CSA U-14 Cup Atlantic U-14 Championships Tier 1 U-14 Provincial Championships Tier 1 U-16 Provincial Championships Tier 1 U-18 Provincial Championships ACAA Men's Championships ACAA Women's Championships NSSAF JV Soccer Championships NSSAF Division 1-5 Boys Championships NSSAF Division 1-5 Girls Championships Soccer NS Provincials CCAA Soccer National Championship - Men's CCAA Soccer National Championship - Women's
<b>Football</b>	St. Mary's Regular Season Football Football Canada Cup NSSAF Football Championships AUS Men's Football Championships Loney Bowl Uteck Bowl	St. Mary's Regular Season Football The Canadian Bowl AUS Women's Football Championships Loney Bowl	St. Mary's Regular Season Football NSSAF Football Championships Loney Bowl Uteck Bowl	St. Mary's Regular Season Football Flag Football National Championships U-16 Male Flag Football National Championships U-18 Male Loney Bowl	St. Mary's Regular Season Football Football Canada Cup Flag Football National Championships U-16 Female Flag Football National Championships U-18 Female NSSAF Football Championships Loney Bowl Uteck Bowl
<b>Rugby</b>	NSSAF Rugby Championships		NSSAF Rugby Championships		NSSAF Rugby Championships
<b>Lacrosse</b>	Women's Lacrosse World Cup			World Lacrosse Championship (mens)	
<b>Field Hockey</b>			Field Hockey Canada National Championships Field Hockey Canada Under 16 Championbships		
<b>Total Annual Events</b>	<b>21</b>	<b>19</b>	<b>20</b>	<b>18</b>	<b>23</b>

There are a number and range of events from minor participant-based events to major spectator events. It is not possible to establish a normalized annual estimate of spectators with any degree of accuracy given that a large number of these events are awarded on a competitive basis. This lumpy and uncertain schedule of potential events will remain a challenge for the stadium business plan until an anchor sports franchise tenant emerges that is capable of generating attendance with a degree of certainty. Accordingly, the stadium event staffing costs are treated as being subject to a moderate degree of change, depending on the number of major event achieved each year.

For purposes of a conservative analysis of economic impact and concession spending, the total combined number of annual spectator visits to the stadium (from all events) is estimated to be in the range of 60,000 – 90,000. These modest numbers reflect the need for a risk-adjusted approach to winning competitive bids for events and should not be read as an indication of a lack of ambition or capacity on the part of HRM to attract events to the stadium.

It is recommended that the stadium be a sustainable community resource with the potential to accommodate larger international and national spectator events with the addition of temporary seating as needed. To illustrate the potential scale and impact of having a facility with major event hosting potential, the following exhibit represents possible major events and estimated attendance, illustrated in 4 year increments.

## Possible Major Events and Indicative Attendance

### Years 1-4

- Football: Uteck Bowl (7,500)
- Field Hockey Canada National Championships (10,000)
- Soccer: CSA National Event held annually (15,000)
- Soccer: CONCACAF Championship Event (3 events @ 15,000 = 45,000)
- Soccer: FIFA Women's World Cup (3 events @ 20,000 = 60,000)
- Major Entertainment Event (20,000)

### Years 5-8

- Football: Uteck Bowl (7,500)
- Soccer: CSA National Event held annually (15,000)
- Football: Vanier Cup (30,000)
- Women's Lacrosse World Cup (10 events @ 4,000 = 40,000)
- Soccer: CONCACAF Championship Event (3 events at 20,000 = 60,000)
- Major Entertainment Event (20,000)

### Years 9-11

- Football: Uteck Bowl (7,500)
- Field Hockey Canada National Championships (10,000)
- Soccer: CSA National Event held annually (15,000)
- World Lacrosse Championship (10 events @ 5,000 = 50,000)
- Major Entertainment Event (20,000)

Possible major events are shown in 4 year groupings as a number of major events are available on a 2 or 4 year rotational basis. It is anticipated that a stadium facility in HRM would host a National event through the Canadian Soccer Association (either exhibition games, friendlies or senior men's or women's matches) each year and one major entertainment event every 4 years. The section which follows provides a full analysis of the market for non-sports entertainment at the stadium facility.



### 6.3 NON-SPORT EVENTS MARKET

Stadia in many other centres are used for large-scale live entertainment events. The Halifax Region has played host to large-scale entertainment events in the past.

This section of the report therefore examines the potential for the Halifax Stadium as a future live entertainment venue. The type of events under examination are those with the capacity to draw 20,000 or more spectators and which qualify under the HRM Events Strategy as “spectacle events.” In particular, these events serve the large-scale outdoor summer concert market.

It should also be noted that the range of events can include outdoor trade shows, as well as significant cultural and community events. As an open air sports stadium, the analysis assumes that the capacity of this facility to tap significantly into this broader non-sports event market is limited. Our assessment of revenues for the stadium reflects the significant risk associated with both entertainment and other non-sports events as predictable annual sources of revenue.

#### 6.3.1 MARKET SIZE FOR LARGE SCALE ENTERTAINMENT IN THE STADIUM

The overall population base within a reasonable travel radius is the best general indicator of whether a given market would be a desirable place for a live entertainment attraction to play.

Driving times to HRM from the furthest centres in Nova Scotia are no more than 5 hours. Driving distances to HRM from key centres in mainland Atlantic Canada are 3-5 hours. The total population of Prince Edward Island, Nova Scotia and New Brunswick is 1.8 million.

Location	Approximate Drive Time
Sydney, NS	5 hours
Yarmouth, NS	4 hours
Moncton, NB	3 hours
Charlottetown, PE	4 hours
Fredericton, NB	5 hours
Saint John, NB	5 hours

HRM has a 2-hour drive time population of some 700,000 – a significant number. Notwithstanding compared to denser eastern North American markets, such as Toronto, Boston, Montreal and Washington, D.C., Atlantic Canada on the whole is a secondary destination when it comes to large marquee attractions of the kind that can draw over 20,000 spectators.

The analysis of the non-sport events market assumes that the market for a large scale live entertainment venue in the HRM is necessarily larger than the population of central Nova Scotia. It is assumed that audiences for entertainment products would come to HRM from surrounding areas in the Maritimes – travel distance being determined by the “pull” of the attraction -- the bigger the name of the act, the greater the market base.

The percentage of tourists who are in Nova Scotia for other purposes who might patronize a marquee attraction is unknown. The assumption is that a relatively small percentage of tourists fit the

demographic profile of large-scale entertainment attendees and would therefore select large-scale live entertainment as part of their Nova Scotia experience.

Marquee acts will be drawn to play in markets where the overall population size and density ensure maximum revenue potential. Since they have the capacity to draw from a wide area, these acts tour to sites that are closely spaced.

Major markets in Northeastern North American which have little or no overlap include:

Market	City Population	Metro Population
<b>Mainland Atlantic Canada</b>	NA	1.8 million
<b>Boston</b>	620,000	4.5 million
<b>Montreal</b>	1.6 million	3.6 million
<b>Toronto</b>	2.5 million	5.1 million
<b>New York</b>	8.1 million	18 million
<b>Philadelphia</b>	1.5 million	6.1 million
<b>Washington</b>	600,000	5.6 million

At just under 2 million people, mainland Atlantic Canada is a viable market but this viability is reduced by its dispersal over three provinces. Only acts with very significant drawing power would have the capacity to attract 20,000 or more spectators.

### 6.3.2 VENUES FOR LIVE ENTERTAINMENT

While Atlantic Canada constitutes a secondary market for major tour circuits, a wide range of attractions have been hosted in large outdoor settings, particularly since 2005.

Large outdoor sites are preferred as they can accommodate larger audiences than fixed seat venues. Audiences also enjoy being outside in the summer months, when much of this activity occurs.

Key outdoor sites capable of hosting 20,000 or more in Atlantic Canada (outside HRM) are:

- Magnetic Hill Festival Grounds, Moncton, NB;
- Université de Moncton Stadium, Moncton, NB;
- Charlottetown Driving Park Entertainment Centre, Charlottetown, PEI;
- Proposed Event Site (Former Imperial Oil Lands), Charlottetown, PEI;
- Cavendish Beach Event Site, Cavendish, PE; and
- Truro Raceway, Truro, NS.

Outdoor sites in HRM capable of hosting 20,000 or more are:

- Halifax Commons; and
- Citadel Hill Garrison Grounds.

Appendix D to this report lists other HRM-area venues which host entertainment events for over 1,000 patrons, and other Atlantic Canada venues which can accommodate 10,000 or more audience members.

### 6.3.3 LARGE SCALE ENTERTAINMENT PRODUCT AND AUDIENCES FOR LIVE ENTERTAINMENT

Large scale entertainment product for outdoor venues over 20,000 are often brought in as a special draw or as headliners for existing festivals. These acts do not always follow the same intensive tour schedules or flows that are seen in the arena show circuit, which generally benefits from a closely spaced string of similar facilities. Historically, marquee international acts which come to major festivals have played only one location in Atlantic Canada. Municipalities and major venues thus compete for high profile acts.

In the past 5-6 years, there have been several large-scale concerts staged in Atlantic Canada. Past acts have included the Rolling Stones, Paul McCartney, U2, AC/DC, Kiss, The Eagles, Aerosmith, and the Black Eyed Peas. Attendance to the shows has varied but has been anywhere between 12,000-80,000 in recent years.

Charlottetown, Moncton and Halifax tend to have at least one major event (20,000+) per year during the summer months. Smaller communities, such as Truro, Canso, and Summerside have also made attempts to draw major acts to the community, or are the host of annual festivals (Stan Rogers Festival, Dutch Mason Blues Festival) which attract bigger name acts.

The Magnetic Hill Music Festival in Moncton is an annual event with an average attendance of approximately 54,000 and a median attendance of 47,500 over the last 6 years. Shows on the Halifax Commons have attracted about 25,000-30,000, while Charlottetown has attracted up to 30,000 to one-off shows in the past.

In each community, there is typically 1 or a maximum of 2 shows of this scale in any given summer. In addition there are often a number of outdoor summer shows or festivals with audiences in the 10,000 range.

### 6.3.4 PROMOTERS' PERSPECTIVE ON LIVE ENTERTAINMENT IN THE STADIUM

The consultations for the Stadium's Business Plan included a focus group discussion with a number of the promoters who are active in the HRM and Atlantic Canada market. Their comments reflected both their collective experience and a consensus about the relationship of the Stadium to market realities and future needs. The outcomes from this discussion have been summarized into a number of themes:

- **Market Size** - Participants continually emphasized that HRM was small market in relation to presentations which might draw 20,000 or more and that the market was not capable of supporting more than one or two such offerings per year;
- **Product Availability** - Participants noted that there are fewer and fewer attractions available which are capable of drawing audiences in excess of 20,000 and that the future of this scale of presentation was uncertain;
- **Scale of the Stadium** - Even if market conditions were better, the proposed Stadium is very large. Participants felt that making it a feasible location for major live events will require investment which would be better spent on existing sites. Venues need to be "right sized" for the market. The current need is not for a large event site but for a building capable of seating between 7,000 and 12,000. Another site for large events may have a negative impact on the existing Commons and Garrison sites;

- Venue Planning - Participants believe that there is a need to make all venue decisions in the context of a comprehensive, long-term plan for live venues in the HRM;
- Possible Uses for the Stadium - Participants recognized that the Stadium could have a role as an occasional site for civic and ethno-cultural celebrations. It would be a safe and secure event site with adequate public amenities. Participants also recognized that such uses, while desirable at a civic level, would not contribute significantly to the business case for the Stadium; and
- Role of HRM - Participants believe that HRM's role is to provide efficient facilities and that it should not be involved in underwriting events. HRM's goal should be to make the existing venues better for both the presenters and the audiences. In this regard, providing adequate infrastructure is key. HRM should also strive to be a user-friendly provider and facilitate the use of its venues and sites.

### 6.3.5 CAPITAL CONSIDERATIONS FOR LARGE SCALE ENTERTAINMENT IN THE STADIUM

This report takes the position that live performance might be an occasional use for the Stadium. Since large scale live performances drawing 20,000 or more spectators in HRM are feasible only once or twice per season, this suggests that investment in the Stadium for this purpose should be minimal. To enable large scale entertainment events, the following is required:

- Augmentation of the public facilities in the Stadium for large-scale concerts would need to include additional capacity (i.e. washroom, vendor, first aid and emergency service, ticket sales and ticket taking, security and front of house accommodations), most of which could be met with portable or temporary facilities for once a season use;
- Augmentation of support facilities in the Stadium for large-scale performance would also be required. Large-scale events having regional draw would typically have significant staging and technical requirements with related infrastructure needs exceeding what is needed to support the Stadium's primary uses;
- Augmentation would also be required for vehicular access and parking and for backstage set-up, including wardrobe and dressing rooms, production offices, storage, etc. The latter could be met through trailers and other temporary facilities;
- In addition, the in-field would need the capacity to support heavy loads, and would need to have structural bearing areas and anchor points; and
- Basic infrastructure to support performance systems and equipment (i.e. power feeds and large scale wiring ducts) would also be needed. Generators can be used if the base building power supply is not sufficiently diversified.

A detailed appreciation of the capital cost implications for large scale live performance events is available in Appendix D.

### 6.3.6 RECOMMENDATIONS REGARDING LARGE SCALE ENTERTAINMENT IN A POTENTIAL HRM STADIUM

The use of the stadium for large-scale live performance events should be adopted and suitable market opportunities sought as part of the marketing plan for the stadium. However, it should be noted that the likelihood of events is limited, occasional at best, and any significant investment in supporting infrastructure for live performance events is not justified by the capacity of the market. Most of the needs of occasional events could be met through temporary and portable facilities.

The recommended augmentation for occasional events should include:

- Provision of additional site area to support temporary front of house facilities with surface preparation, heavy vehicle access and hook-ups;
- Provision of additional site area for a secure bus/truck yard with suitable surface preparation, heavy vehicle access and hook-ups;
- Provision for heavy vehicle access onto the site;
- Provision of in-field sub-structure to support heavy vehicle access, point and up-lift loads;
- Provision of sub-grade power and signal ducting;
- Provision of diversity within capacity of base building power; and
- Provision of tractor-trailer parking on site or nearby.

Our review of other venues that have actively programmed the field turf facilities for non-sport events including concerts and corporate events illustrates the challenges of accommodating these uses on a specialized surface while maintaining the integrity of the surface and maximizing its life span.

## 7 ESTABLISHING PRINCIPLES TO GUIDE DEVELOPMENT

### 7.1 INTRODUCTION

The following principles should guide the determination of both form and function of a prospective spectator stadium capable of hosting the FIFA 2015 Women's World Cup Tournament matches. Based on our market review, these can be seen as factors necessary for the success of the stadium in meeting its core mandate:

- As a major spectator venue; and
- As a hub of community sports and recreation development.

These principles, or success factors, reflect both existing HRM corporate policy regarding social and economic development, as well as conditions necessary to support the financial viability of the Stadium.

The site selection process for a potential stadium is to be addressed in subsequent phases of the stadium development process. The objective of the Phase 1 Business Plan analysis is to determine the potential feasibility of a stadium in HRM in the absence of identified candidate locations. However, the form, function and feasibility of the facility will be impacted in part by its location. As such, the guiding principles outlined below also reflect key locational criteria necessary to ensure success. Appendix E contains a full listing of the range of locational criteria, against which candidate sites should be evaluated in the next phase of the Stadium development project.

### 7.2 HRM STRATEGIC POLICY DIRECTIONS

The development of a large capacity venue such as the stadium has a number of policy precedents. HRM has approved a number of strategic policies which either support the development of additional event infrastructure or lend support to many of the principles which should guide the form, function, and location of the stadium. The key policy documents are outlined below and are in addition to the existing 2008 Community Facilities Master Plan which promotes, subject to local needs, the greater centralization of services in multi-use facilities and sportsfield complexes.

#### HRM Corporate Plan 2011-2012

The HRM's Corporate Plan reflects Regional Council's direction and focus areas and describes how HRM intends to achieve planned outcomes in partnership with the community. Priorities are identified in the following areas:

1. Safe, Inclusive, & Welcoming Communities;
2. Diverse Lifestyle Opportunities;
3. Well Planned & Engaged Communities;
4. Economic Prosperity;
5. Clean & Healthy Environment; and
6. Integrated & Affordable Transportation Networks.

Under the priority of “diverse lifestyle opportunities”, the following has goals have been identified specifically:

*The Regional Centre is HRM’s culture, leisure and entertainment capital.*

- Strategically invest in local creative and entertainment sectors to enhance the Regional Centre;
- Ensure the Regional Centre has a range of cultural, entertainment and leisure facilities;
- Create an arts, culture, and entertainment policy and strategic plan for the Regional Centre;
- Identify priority culture, recreation, and leisure initiatives for the Regional Centre;
- Support the use of HRM’s urban spaces in new and innovative ways to facilitate unique; and
- Interesting programming.

### **Capital Ideas: Leveraging Urban Investment for Regional Prosperity**

At the Regional Council meeting of July 6, 2010, Halifax Regional Council approved to adopt, in principle the discussion paper titled, “Capital Ideas: Leveraging Urban Investment for Regional Prosperity”. The mandate for strategic infrastructure development in HRM reflects the Provincial interests in the success of HRM as an engine of economic growth.

“Capital Ideas” champions a healthy urban core as the most powerful tool available for addressing the financial and environmental challenge facing all cities. It describes HRM as a “community of communities which demands a thriving urban core that is given every opportunity to succeed and excel. The discussion paper describes an approach to identifying key strategic public investments in the Regional Centre that will catalyze private investment, resulting in strong economic impacts throughout the municipality.



**Exhibit 32 Map of HRM Regional Centre and Urban Core**

Source: A Greater Halifax Economic Strategy, 2011-2016

### **A Greater Halifax: Economic Strategy 2011-2016**

The economic strategy for Halifax 2011-2016 replaces the Municipality's five-year economic strategy – Strategies for Success which expired in early 2011. A Greater Halifax is the result of collaboration between representatives of all three levels of government, business, post-secondary, not-for-profit and



community volunteers. These participants volunteered over 3,000 hours developing this strategy. They consulted widely to ensure that this strategy aligns the priorities and expectations of business, government, and the whole community. The strategy names 5 goals for HRM:

Goal	Description
<b>Regional Centre</b>	Build a vibrant and attractive Regional Centre that attracts \$1.5 billion of private investment and 8,000 more residents by 2016
<b>Business Climate</b>	Promote a business climate that drive and sustains growth by improve competitiveness and by leveraging our strengths
<b>Talent</b>	Create a welcoming community where the world's talent can find great opportunities, engages employers and resources for career advancement.
<b>International Brand</b>	Create a unique, international brand for Halifax Regional Municipality.
<b>Maximize Growth Opportunities</b>	Capitalize on our best opportunities for economic growth.

As a Hub City, HRM is recognized as providing regional economic assets - those which provide positive net incremental economic impacts to the Province as a whole (for example the airport, Port of Halifax, education institutions, and the existing sport and entertainment opportunities). These assets provide ongoing opportunities for developing the regional economy, with HRM at its heart. The development of a stadium is an outcome of this Hub City role.

The 2011-2016 Economic Strategy recognizes the importance of maintaining a high quality of life, as well as the ongoing investment in culture, infrastructure and economic growth by other cities. This requires a response by Halifax to maintain and nurture its quality of life, based in part on investments in infrastructure. Allied to this, Halifax is signalled as a City which needs a stronger international brand – the ability to successfully host international events is fundamental to enhancing the international reputation of the region.

### HRM Event Strategy

The Event Strategy, 2010, is designed to provide a road map for growing the events market in HRM over the next 10 years.

A central goal of the Strategy is to enhance event impact through a range of means including increases to event sector capacity, better quality of events and improvements to event infrastructure. The expansion of the event calendar in HRM is also targeted, and includes the objectives of: maintaining and developing existing recurring events as well as hosting high-profile international events. The Events Strategy recognizes the existing constraints imposed by the lack of a large seating venue such as a stadium and the need to overcome these limits if the policy aims of the Strategy are to be fulfilled.

As noted, this report does not address locational criteria explicitly. However, the City has identified a number of urban planning goals outlined not only in the above policies but in a number of ongoing initiatives: Capital Ideas, the Neighbourhood Greenprint, the Strategic Urban Partnership and others.

### 7.3 GUIDING PRINCIPLES FOR DEVELOPMENT

In addition to supporting the above policy goals, the following represent those aspects of both development planning and implementation for the facility which maximize the potential to meet the mandate for community recreational access as well as creating a flexible venue which improves the event capacity in the Province. These principles, or success factors, reflect both existing HRM corporate policy regarding social and economic development, as well as conditions necessary to support the financial viability of the Stadium. The following list represents the guiding principles for development as determined by the consulting team.

**1. *Maximizing the potential for tournaments (local, provincial, and regional) requires multiple fields as well as training and staging facilities.***

The development of a single field stadium significantly restricts the potential to host tournaments in the Region. Single field stadia are traditionally associated with major sports franchises rather than a functional requirement to host localized tournaments. Much of the market opportunities for soccer and other field sports in HRM relates to tournaments servicing the regional market place of Atlantic Canada. Consideration should be given to the requirement of sufficient land in order to capture multi-use potential.

**2. *Build for future needs and opportunities.***

Responding to today's market realities should guide the immediate form of development. Building to accommodate a facility which can generate markets in the future for HRM should also guide not only the current form of development but the approach to development over time. Development of a facility will open up new opportunities and the Halifax Regional Municipality can expect to achieve a portion of those opportunities which are enabled.

**3. *Recognize the opportunity cost of doing nothing, or of underbuilding to the necessary level of scale and quality.***

Recognition that the Facility will grow the market and represent a level of infrastructure which is arguably the cost of doing business to compete nationally and internationally.

**4. *Expandability as a core opportunity and a business case expectation.***

The essential requirement for expandability of this stadium should inform the design specifics, the location, the scale of original building systems, as well as represent an operating principle of the facility. Expandability relates to both capacities to expand on a temporary basis (additional seating) which maintains a high quality spectator environment as well as permanent expansion of seating and facility services.

**5. *Allied to this expansion capacity, the stadium should be capable (via expansion) of accommodating a commercial sports franchise.***

Expansion capacity should not be restricted to the stadium itself but should include scalability off-site: sufficient regional access, parking, and an integrated transportation solution to enable the site and surrounds to handle large volumes of spectators attending major games or events.

**6. *Location to reflect the principles of existing Municipal Strategic Directions for Urban Development and reinvestment in areas with existing urban infrastructure.***

The most appropriate site for the Stadium will involve additional complimentary uses on site or in proximity. Locations with existing complimentary uses and infrastructure should be sought, including sites with existing or planned recreational infrastructure close by, sites which offer redevelopment of underutilized lands, and sites with necessary road and transit infrastructure (existing or planned). The capacity of the Stadium to act as a trigger to additional development in the surrounding area through improved site services should also be addressed in Phase 2 of the project.

**7. *Pursue sites with visibility and which maximize accessibility using a range of modes of travel.***

The selected site should ensure that transportation accessibility of the site is maximized when balanced against other locational criteria. The site should maximize the potential associated with naming rights by (i) ensuring an attractive location with maximum usage by the resident base, and (ii) a site with maximum visibility.

**8. *Adopt a realistic approach to off season usage for the overall facility which can include both use of demountable fabric bubbling of the field during the winter months, as well as an accommodation of special events utilizing both the field and the building structure of the stadium.***

Special events such as ice surfaces on the field of play offer opportunity, as does its use for winter carnivals and other events – contingent on these activities being “net new” events to the community and not simply transfers from other sites in HRM.

**9. *Where appropriate, pursue non-compete provisions with existing suppliers of recreation facilities in HRM both during the summer season and off season.***

Avoid cannibalization of existing services and facilities including those operated by HRM itself.

**10. *Support Stadium-Related Retail.***

The stadium should support new retail which creates sustainable additions to the property tax base. However, commercial retail space lease in the building should reflect those uses which are appropriate for a building of this nature (for example food and beverage, sports, fitness, health and wellness related).

Retail and food services should maximize the opportunity for serving spectators during events and participants in the facility as a means of maximizing operating revenues. In most instances, this translates into a retail provision which is ancillary or complimentary to the core business of the facility as a community and event sports venue.

Additional retail on-site should be developed by the private sector and should be based on an identified additional opportunity in the local area.

**11. Be business case-specific about multi-use opportunities.**

- a) Multi-use provisions for the stadium field should include:
  - Soccer and Canadian Football and recognize its potential use for other sports including some sports that are not best suited for artificial turf (field hockey); and
  - Do not include a running track within the stadium itself but recognize that a track and field use on land adjacent to the stadium provides significant opportunities for bidding track and field or other multi-sport event as well as hosting other large outdoor events in the future. The track and field component could, in future years, represent a redevelopment opportunity for higher order land uses.
- b) Actively build spaces within the stadium grandstand(s) as a multi-use opportunity and potentially part of a multi-development opportunity involving other recreational assets on site (Shared building services, access, spaces, amenities, parking, and costs, as well as a shared customer base);
- c) Operate as a 12-month a year opportunity;
- d) Recognize multi-use as a phased achievement over time – plan for it in site design and in scaling building and services systems; and
- e) Consider expediting (bringing forward) the construction of suitable other recreation facilities where such development would result in significant overall cost savings.

Pursuant to this principle, Phase 2 should consider in greater detail the likelihood of achieving cost savings through designing both a stadium grand stand together with other identified recreational facilities.

**12. Animate the site as a campus or precinct.**

Add related activities as part of the build-out plan, to include not only recreational uses identified above but also commercial office, retail and other development. Multi-use of both the building and the site requires a flexible build-out plan. Alternatively, the stadium can be part of an existing commercial node where this represents a complimentary use.

There are a number of good examples of shared services business models including BMO field which is operated along with the Ricoh Coliseum Arena, Varsity Stadium and its attached arena as well as the proposed development of Landsdowne Park in Ottawa which will include the stadium, as well as the arena and an exhibition building. This integrated land use approach is in line with current thinking in many jurisdictions. This applies to both spectator-driven venues as well as community recreation venues where centralization of facilities creates capital and operating efficiencies but also promotes a high quality of recreational service and convenience for the public.

In order to realize the stadium as an anchor to a year round community recreation campus, HRM must be the driver in making this happen. Phase 2 of the Stadium Development Plan should result in capital cost analysis and design objectives which address the alternative options

of a stand-alone stadium developed as a first phase of a multi-use campus, and the development of a stadium as part of a larger recreational complex developed concurrently or which already exists.

**13. *Develop to high level of quality.***

Ensure the necessary back of house is built to maximize the chances of success in achieving those major soccer and other events which are either annual or biennial. This includes ensuring that concession areas, VIP, hospitality, change rooms medical offices and other facilities are all developed to a standard capable of hosting national events. Even in small scale facilities, the attention to detail in the back of house can be significant. In Toronto, Varsity Stadium (500 spectators per game) has created a 6,000 sq. ft. pavilion which houses state of the art football viewing platforms, team meeting rooms, fitness facilities, as well VIP hosting capabilities. This not only provides the opportunity to attract international events which may represent one off or highly occasionally events but also increases the potential for corporate hosting opportunities. Professional standard change rooms are also essential even in the absence of a franchise. International competitions will often demand this level of service.

**14. *Consider innovations in construction techniques.***

Be bold, recognize that as there is no franchise, both the design, construction and operation of the facility should showcase a level of innovation that is recognized both nationally and internationally as best practice.

**15. *Recognize trade-offs.***

A multi-use facility based on field turf will limit the potential for hosting events such as the men's' soccer World Cup qualifier which requires grass as do a number of other major soccer and rugby international fixtures.

**16. *Integrate events planning in facility management.***

If the stadium is to emerge as more than community-driven sports facility, its programming needs to be integrated by overall destination marketing efforts for HRM and Nova Scotia as a whole. There are significant advantages for creating an operating model which involves private sector management and which ensures complementarity to the Municipality's and Provinces wider efforts at an event development.

## 8 RANGE OF FACILITY OPTIONS

### 8.1 RANGE OF USES VS. SOCCER SPECIFIC

The physical design specifications of the stadium should be based on the following recommendations:

- A soccer-specific design is only an option where the scale of the facility is modest and where the operation is either by the City or a provincial or local user group (Soccer league or Soccer Nova Scotia). The model would have to be modest given the specific nature of the usage and the need to ensure break-even in operating terms. Given that it would not be a primary event space of any significance it is not anticipated that HRM would seek to be involved in the operating risk of the facility;
- Based on our analysis there is no apparent benefit to precluding other uses. This would only be an option where a major league soccer franchise exists or whether the site dictates; and
- Notwithstanding, it is anticipated that the principal user of the facility and field time will be soccer and hence a partnership (formal or otherwise) with Soccer Nova Scotia is an essential element of the facility as both a participatory event venue as well as a spectator venue for major regional, national, and occasional international events.

### 8.2 WINTER USAGE OPTIONS

With regard to potential winter usage of a stadium facility, options include: erection of a dome structure over the field of play which would shelter the field and users and as a more complex option, conversion of the field of play to an ice surface.

Conversion of the stadium field of play into an ice field is an attractive proposition for the possibility of ice events which could be held and the degree of public accessibility in winter months. Should this option be pursued, several considerations must be taken into account. Firstly, implementation of an ice rink over existing turf will significantly reduce the lifespan of the turf. Secondly, this option would necessitate capital investment in refrigeration and maintenance systems. And thirdly, the operational costs and maintenance of an ice field must be considered.<sup>8</sup>



*The first NHL Winter Classic held in Buffalo, New York at Ralph Wilson Stadium*

<sup>8</sup> . Evidence suggests that while refrigeration plant can be accommodated in the original design for a modest capital cost (\$300,000), there have been problems of permafrost created underground which creates additional maintenance and repair costs.

### 8.3 EXCLUSION OF RUNNING TRACK

It is not recommended that an athletics track be included as a component inside the stadium. The loss of intimacy which accompanies the distance separation between touch line and the stands would significantly lessen the appeal of this facility as a hosting venue for major soccer and football games.

The inclusion of a track offers an acceptable compromise in some locations but should not in our opinion be part of the initial design brief for the stadium. A good example is Varsity Arena in Toronto whereby the University made the decision to change the form and function of the stadium from a 20,000 seat stadium to a 4,000 seat stadium but one which had the addition of an IAAF sanctioned track capable of hosting international track meets. While that decision was appropriate for the University of Toronto, the intention of building a stadium in HRM is to promote significant spectator events and potentially a franchise in the future.

The addition of a track on the outside, adjacent to the stadium may be a viable opportunity should sufficient land be available. To construct a track on the interior of the stadium would likely create significant extra cost for its later removal and either represent a fundamental redesign or necessitate significant compromise on its original design. Examples from a number of major venues in the world confirm this.

It is also evident that a provision of an IAAF sanctioned track on the interior of a stadium creates potential compromises on the use of the infield for non-sports (entertainment) events and winter doubling. The need to operate heavy equipment can, for example, threaten the integrity of the track if warranted for use as an international standard running surface.

As identified in the principles to guide development, it is essential that the design of the facility incorporate the specs of a Canadian football field. Furthermore, the design should accommodate (within cost-acceptable means) basic building elements required of any stadium for a CFL franchise.

### 8.4 STAND-ALONE VS. MULTI-FACILITY VENUE

Baseball Nova Scotia has stated that although they are not interested in programming in the stadium facility, they would be interested in programming an adjacent facility. Case study research shows several examples of operational efficiencies which can be realized through development and operation of multiple facilities in a common location.

The question is not whether the facility is stand alone at the outset versus development as part of an existing multi discipline campus, but whether it has the potential for becoming a multi-use sports campus over time. This is a matter for Phase 2 of the stadium development process with respect to site selection; however it is relevant to the business case as there are potentially significant differences between a restricted site and a campus of sports related uses in terms of revenue sustainability and operating cost minimization.

The answer to whether a stand-alone site is ultimately acceptable depends on a number of factors. Chief among these are the locational requirements which may exist in order to achieve necessary partnerships with other organizations and institutions with funding and/or interests in operating/programming the facility.



In the context of this analysis, an assessment has been undertaken of the capacity to redesign an existing facility in the City to achieve the 20,000 seat specifications for the FIFA world cup event, as well as a legacy design which provides for a major venue for major spectator sports events within HRM. The results of this analysis demonstrate that a comfortable expansion of the seating at the facility is achievable if the track is removed. This could yield approximately 13,900 seats. It does not meet the FIFA requirements.

The value of partnerships (for example with the Universities) may dictate locational considerations. Whether a space restricted site is a tenable option depends on the commitments to utilization of the facility by the Universities or other institutions involved in any partnership, and the terms of risk-sharing in both capital and operating. Typically, these are aspects of detail which are not addressed in concept planning. However, it is important that Phase 2 of the process (site location) addresses these questions in order to accurately measure the costs and benefits of alternative sites.

## 8.5 GRANDSTAND AND SEATING TYPES

The following is a discussion of alternative grandstand construction and seating types, for purposes of illustration the following seating types are categorized as types A, B, and C.

### Type A Seating

Seating in a permanent grandstand that incorporates permanent occupancies within the grandstand building. These occupancies may include, change rooms, offices, medical facilities, retail outlets, broadcast/ media facilities, lounges & executive boxes and permanent concession spaces.



### Type B Seating

Seating in a grandstand that has no permanent occupancies below apart from washroom facilities and temporary event based concession spaces



### Type C Seating

Seating in a temporary grandstand or bleacher structure erected for a specific event.





## 8.6 RANGE OF STADIUM OPTIONS

Based on the foregoing analysis, the following table summarizes the range of stadium options in terms of description of each, the extent of compliance with FIFA specifications and the relative contribution of each alternative option to establishing the important goal of legacy potential and event hosting in HRM.

	Option	Description	FIFA Compliance	Legacy Potential/ Expansion Capacity	Contribution to Local and Provincial Economic Impact	Preference
1	Do Nothing Or Build Temporary	Business as Usual	FIFA requires 20,000 chair backed seats, 10,000 of which are considered permanent.	None	Significant lost opportunity in terms of future spectator and participatory event-related economic development.	Temporary not an option.
2	Build Minimally for the FIFA Tournament	Build the minimum number of permanent seats without development of a grandstand; building areas constructed at lower cost and to meet minimum FIFA requirements for tournament.	Must meet FIFA seating capacity and functional requirements both for internal space, circulation, exhibition area, security and other needs.	Does not maximise legacy opportunities, enable expansion on existing base of development; fails to deliver opportunity for a range of users at the site.	Highly limited over the long term; Operations would be seasonal only and limited large scale events forthcoming.	Poor reputational leverage for City; No long-term value for money (minimum cost would be \$30 million).
3	Develop Grandstand-based Permanent Seating Facility	Build 10,000 to 11,000 (design-based determination) permanent seats in one principal grandstand and an opposing secondary grandstand Includes necessary temporary seating (9,000 to 10,000 seats) to Host FIFA tournament.	Compliant and provides a higher standard of fit-up of interior building spaces necessary for hosting not on FIFA tournaments but also some national soccer team and other exhibition games.	Significant - premise of the development rests on expansion on the existing building base with minimal tear-downs of existing permanent structure should expansion of permanent seating become a necessity. Maximizing legacy potential still rests on temporary seating as needed.	Inclusion of a fully programmed building / grandstand offers a basis for multi-use and development of campus of sports-related uses; Good potential for economic impact from maximizing both participatory and spectator events.	Best Value for Money - ease of incremental expansion is critical attribute; variant exists for additional permanent seating with limited operational impact; Development of a campus with potential for placing track and field and other training /playing surfaces adjacent will maximize event appeal of the venue.

	Option	Description	FIFA Compliance	Legacy Potential/ Expansion Capacity	Contribution to Local and Provincial Economic Impact	Preference
4	20,000 Permanent Seats	Build all of the seating to permanent standard with grandstands per above and additional seating at opposing ends of the field.	FIFA Compliant - and exceeds marginally the MLS stadium requirements; Importantly, this fails the CFL seating requirements.	Expansion capability would be essential in the absence of MLS; Facility would accommodate major international soccer games (incl. World Cup Qualifiers) but with high profile games, natural grass is essential.	Unlikely to be significantly greater than a 10,000-11,000 seat permanent venue of high quality with a multi-use mandate.	Significant diminishing Returns from additional capital investment despite limited additional operating costs; Field turf requirements of community use are in conflict with FIFA needs; No advantage to a 20,000 permanent seat facility operating as both a provincial recreation and event centre.
5	25,000 Permanent Seat Stadium	Building of a stadium capable of hosting a CFL franchise.	Compliance for CFL but no gain for FIFA compliance (and presence of field turf reduces utility by for FIFA sanctioned senior games).	In the absence of MLS and CFL, legacy potential no greater than a moderate sized facility (10,000 seats plus temporary seating capacity and with expansion potential).	No greater in the absence of a CFL franchise.	Not a value for money proposition at this time - scale of capital cost and depreciation such that the maximum expandability and most flexible site location are better principles to adopt at this time; Government will not currently fund overt plans for stadiums specific to professional teams and wider events and community based model of stadium operation does not warrant this scale.

The following highlights the relative cost benefit of each approach:

### 1. ***“Do Nothing”***

This is the business as usual perspective – with the existing portfolio on event spaces in the Municipality being used to host any and all events which the Municipality has been successful in acquiring over the years. By its definition, it provides no legacy and does nothing to develop the event market in the Province or incentivise the prospects for a sports franchise anchor tenant. There is a significant opportunity cost attached to this option:

- A loss of any and all impact from large scale events such as the world cup in 2015;
- Similarly, a loss of those lesser events which none-the-less provide economic stimulus. This includes a range of events which are regional (Atlantic Canada) as was national in nature;
- A loss of economic impacts from the staging of annual soccer and other games by one or more of the national teams of the CSA; and
- The inability to obtain all of the reputational, quality of life and other benefits associated with provision of the integrated sports and events infrastructure.

### 2. ***Build Minimally for the FIFA Tournament***

Meeting only minimum requirements will undermine the longevity of this facility. More importantly is its capacity to operate as a *bona fide* multi-use stadium complex which can host a range of events, and cater to both national events as well as a range of regional, provincial, and local events. In the competitive landscape of event hosting, failing to meet standards which are expected result in limited competitiveness. Moreover, those facilities which exceed standards for facility specifications are often able to attract additional events and/or return events. In so doing, this added investment in quality and functionality enables significant returns in the form of additional events and economic impact on the economy.

### 3. ***10,000+ Permanent Seats***

This represents a sustainable market opportunity for HRM predicated on the idea of expandability to house a professional team – building components, services and quality should reflect this. This scale of facility should be predicated on the development of a highly usable grandstand which houses all the major building requirements (various occupancies) associated with the stadium as a multi-use venue.

More important than the precise number of permanent seats that are achieved, is the development of the grandstand building as well as an opposing secondary grandstand which is permanent in nature. The key attribute in the option is its capacity to enable expansion of the seating base on both grandstands should the development of additional permanent seats be warranted in the future.

Exhibit 33 demonstrates how the 10,000 permanent seat stadium with additional temporary seating can accommodate both the FIFA event and accommodate a legal CFL sized field post event. The breakdown of the permanent seating is shown below.

**Exhibit 33 10,000-Seat Permanent Seating Facility; 20,000 FIFA World Cup**

Games Mode	
Main Grandstand – Type A permanent Seating	5,000 seats
Main Grandstand – Temporary Seating	5,000 seats
Opposing Grandstand – Type B Seating	3,000 seats
Opposing Grandstand – Temporary Seating	3,000 seats
Permanent Seating behind goals	2,000 seats
Temporary Seating behind goals	2,000 seats
<b>Total</b>	<b>20,000 seats</b>

In legacy mode, the temporary seating on the main grandstand is removed leaving the precast concrete structure together with the 5,000 seats. On the opposing side, permanent seating based on steel construction remains. The temporary additional seating is removed. Additional seating at either end of the playing field represents a less than standard seating and can be retained or consolidated on one side, providing a total permanent complement of 10,000 seats. The arrangement allows for ease of expandability, most particularly on top of the main grandstand which houses all of the building functions. This arrangement is similar to a number of facilities including BMO field which has a total grandstand seating capacity of 12,000 seats with approximately 4,000 seats built as part of the precast concrete building structure itself and the remaining 8,000 built as permanent seating via steel structure built on top of the precast concrete building.

An important variant is to build out a complete grandstand in the order of 10,000 or more seats, together with the seating on the opposing side of the field. This would yield somewhere in the order of 13,000 to 15,000 seats overall and can include the necessary roof structure, on the main grandstand. However, any full build out of the grandstand to accommodate a professional sporting franchise or other operations in the future would include corporate boxes as part of the grandstand. There is no market need at present to build corporate boxes at the facility in the absence of regular professional sporting events. In order to reduce unnecessary capital costs, the option to build an entire permanent complement of seats and corporate boxes on the main grandstand is unwarranted at this time. However, the option for creating additional permanent seats on site is also a function of incremental capital costs, marginal operating costs associated with the additional seats, and the potential to avoid purchasing or renting temporary seating for larger events. The merit of an incremental permanent seat addition above 10,000 should be addressed in Phase 2 as part of the capital cost and design review.

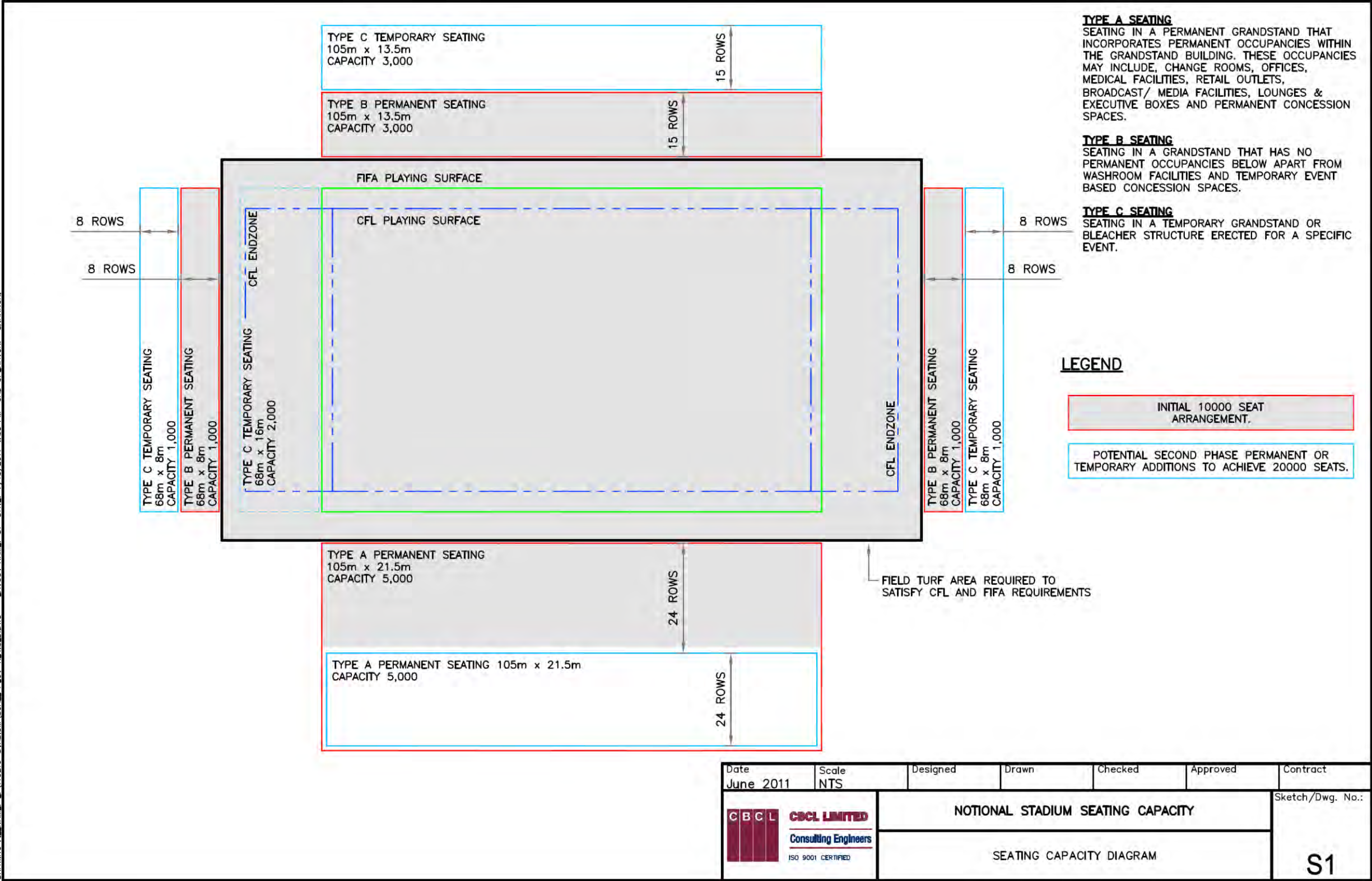
**4. Professional Franchise Seating Options**

The remaining options pertain to the consideration of a 20,000 seat permanent facility as well as a 25,000 permanent facility. The former relates to the needs for a typical MLS franchise and the latter for a CFL franchise. Based on the market opportunity at present, there are a limited number of soccer or exhibition football games that can likely be attracted to this facility that

would require (or benefit) from the facility being advertised as a 20,000 permanent seat facility. This is because other venues will also compete for these games.

The cost-benefit equation does not warrant the additional capital expense at this time. More important is the expandability of this facility should these market conditions change and provide realistic potential for achieving regular events of significant spectator scale. The above conclusions take into account that the additional capital cost do not translate into proportional increases in operating costs of the facility. Given this, the more relevant comparison is between capital cost of incremental permanent seating and its depreciation and lifecycle maintenance costs, versus the merit of temporary seating on an as needed basis. In short, 1 or more 20,000 person games in each of 3 consecutive years would cost the equivalent of permanent seating. However, this excludes various building upgrades and services that are inevitably required when transitioning from temporary to permanent seats, irrespective of whether the market opportunity for large scale events is likely to be maintained. Based on the uncertainty surrounding the capacity for regular large scale spectator events, the option of building 20,000 permanent seats at the outset is not recommended.

Exhibit 34 10,000 Permanent Seat Stadium





## 8.7 ALTERNATIVES AND USABLE BUILDING SPACE

Exhibits 35, 36 and 37 show the following alternative designs:

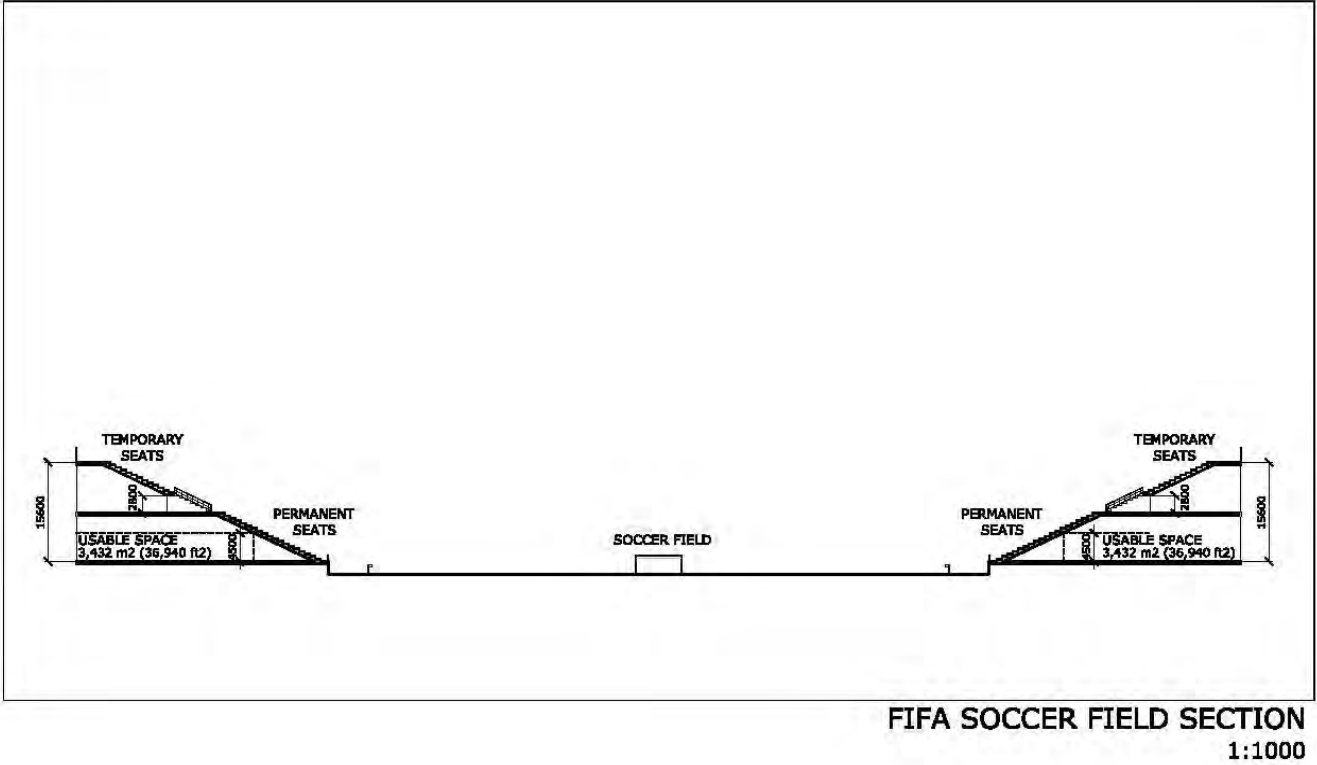
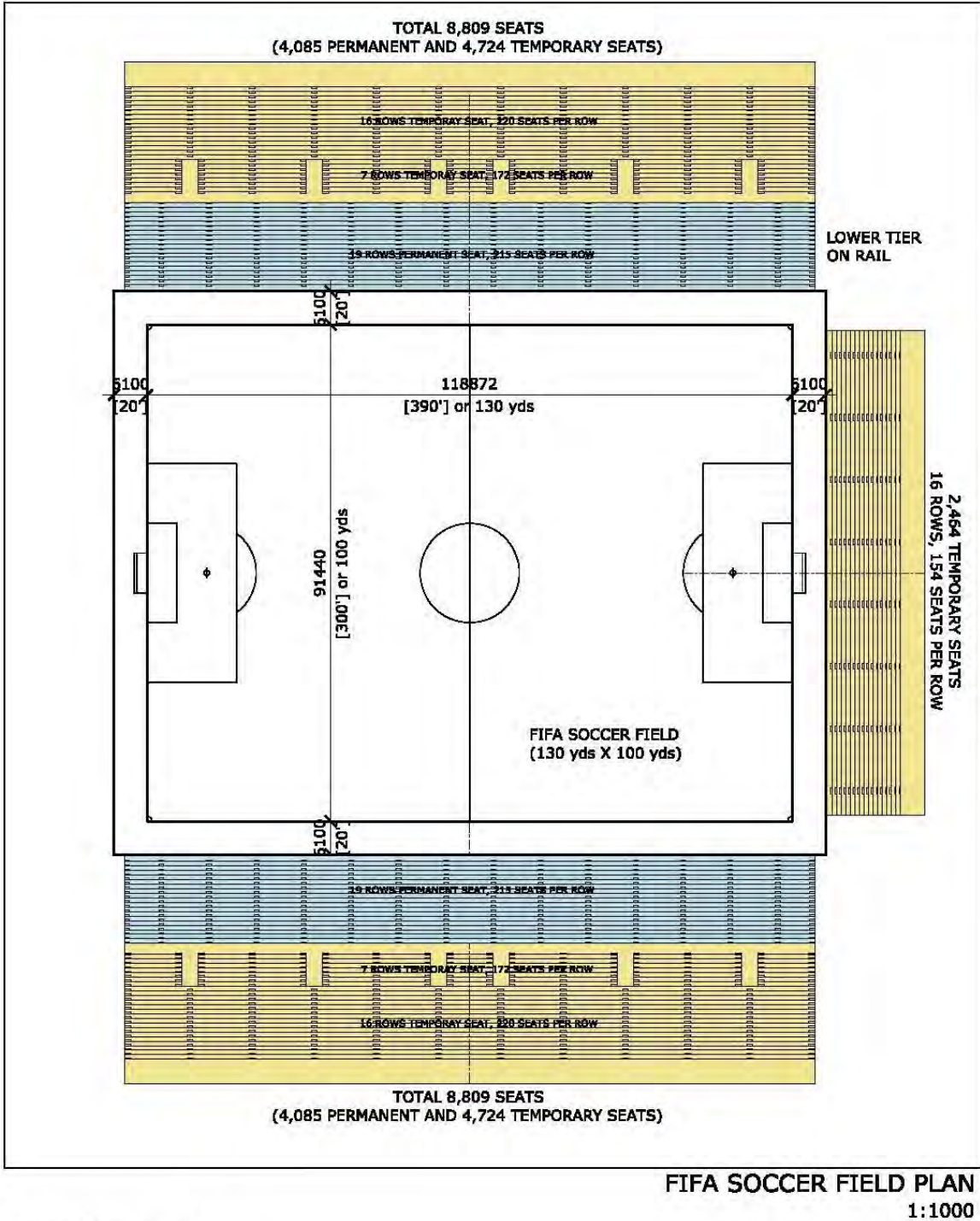
- Scenario 1 development of a FIFA soccer only field plan with seating on 3 sides and achieving a permanent total complement of only 8,000 +/- seats and a temporary base of 12,000 seats.

Whether the permanent grandstand complement is loaded on one side or evenly split, and whether it is 8,000 seats or 10,000 seats is a matter of consideration for Phase 2 depending on site specific and other factors. However, the usable space remains a function of the number of permanent seats and developed as part of the pre-cast structure. In this example, a 4,100 permanent seat grandstand has usable space of some 37,000 sq. ft. within the building of the grandstand.

- For Scenario 2 (Legacy Mode) with seating on 3 sides and accounting for CFL field requirements, the usable space remains the same.
- Scenario 3 shows a build out scenario whereby a CFL franchise has been achieved and expansion of the facility occurred. Based on the principle of permanent development based on the existing grandstand, the usable space under a permanent 10,000 stand rises to 48,000 sq. ft. As noted, the CFL build out plan is not market viable at this time or fundable under government grant programs.



Exhibit 35 Scenario 1



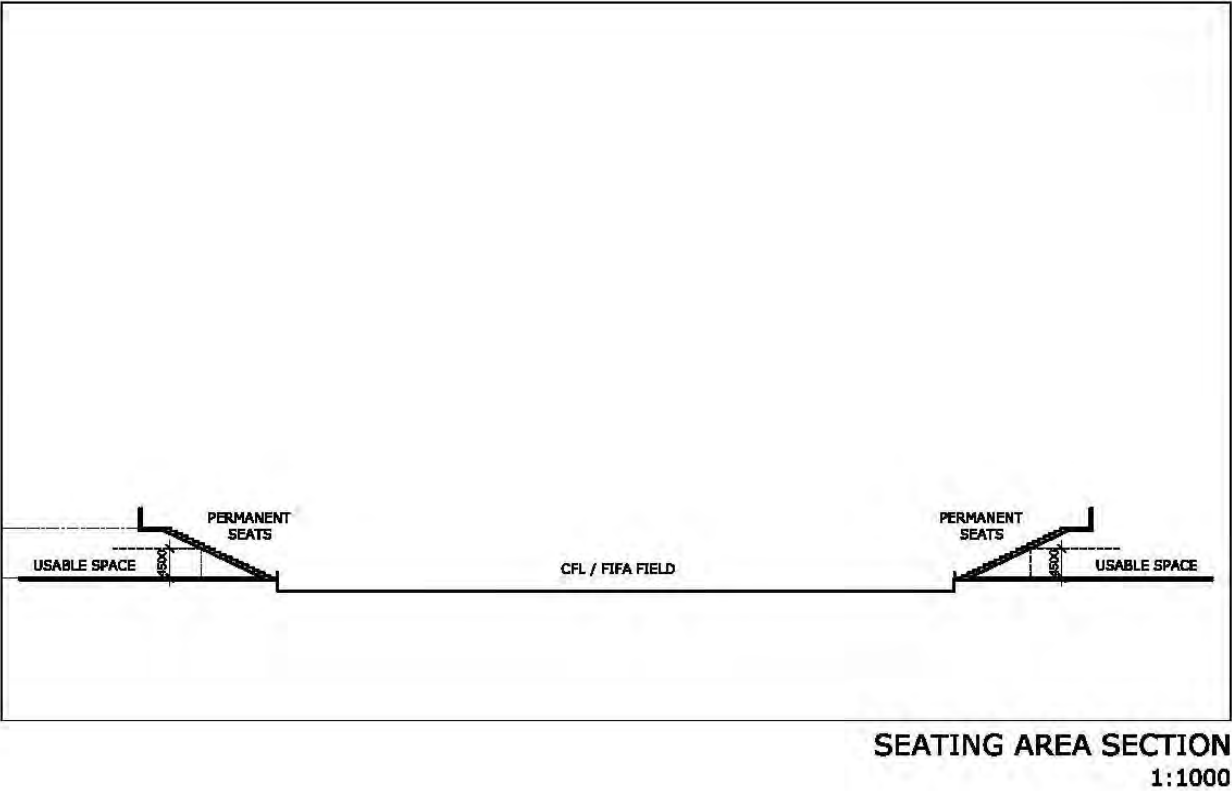
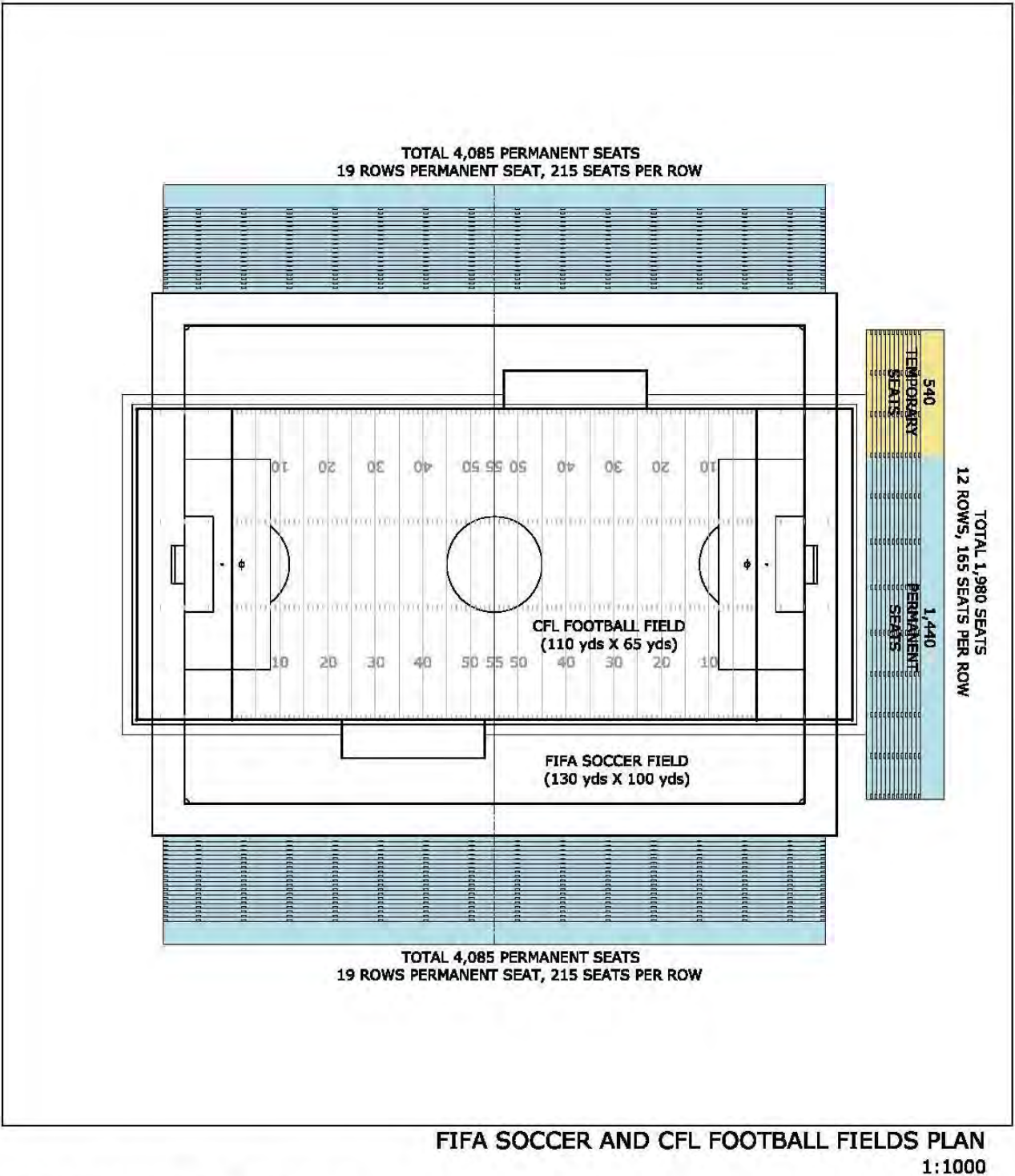
PERMANENT SEATS:	8,170
TEMPORARY SEATS:	11,912
TOTAL No. OF SEATS:	20,082

SCENARIO ONE

SCHEMATIC FIFA SOCCER FIELD STUDY  
JULY 4, 2011



Exhibit 36 Scenario 2



TOTAL No. OF PERMANENT SEATS: 10,150

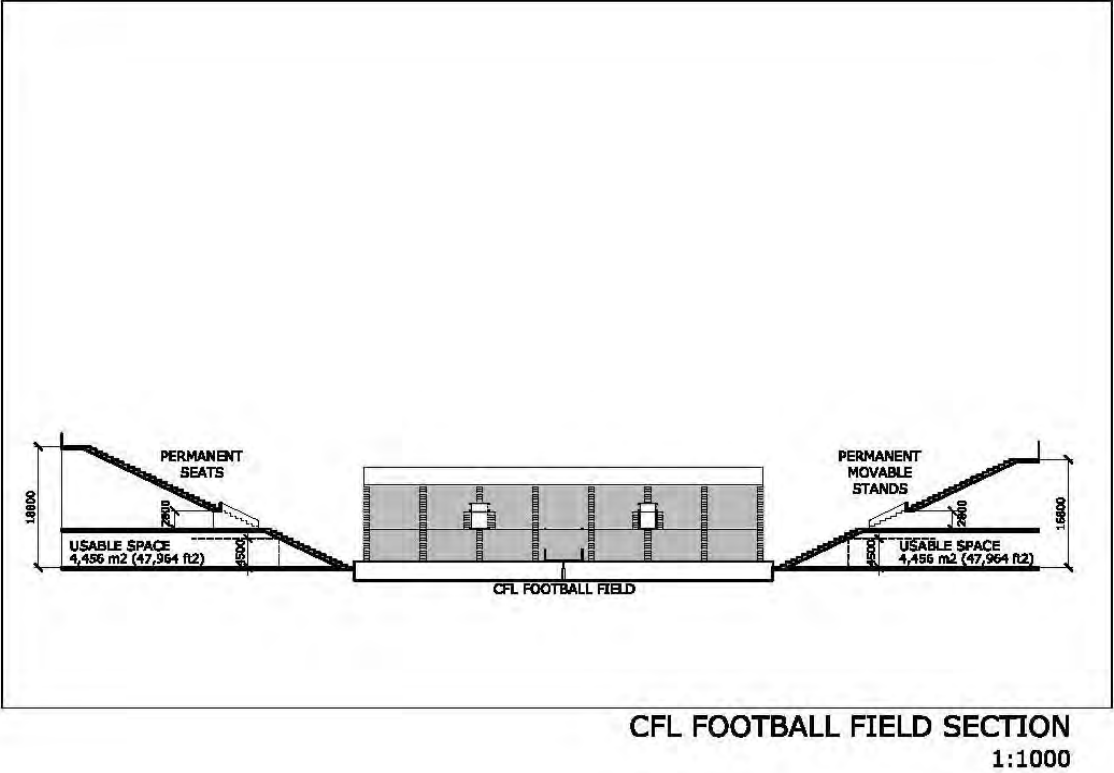
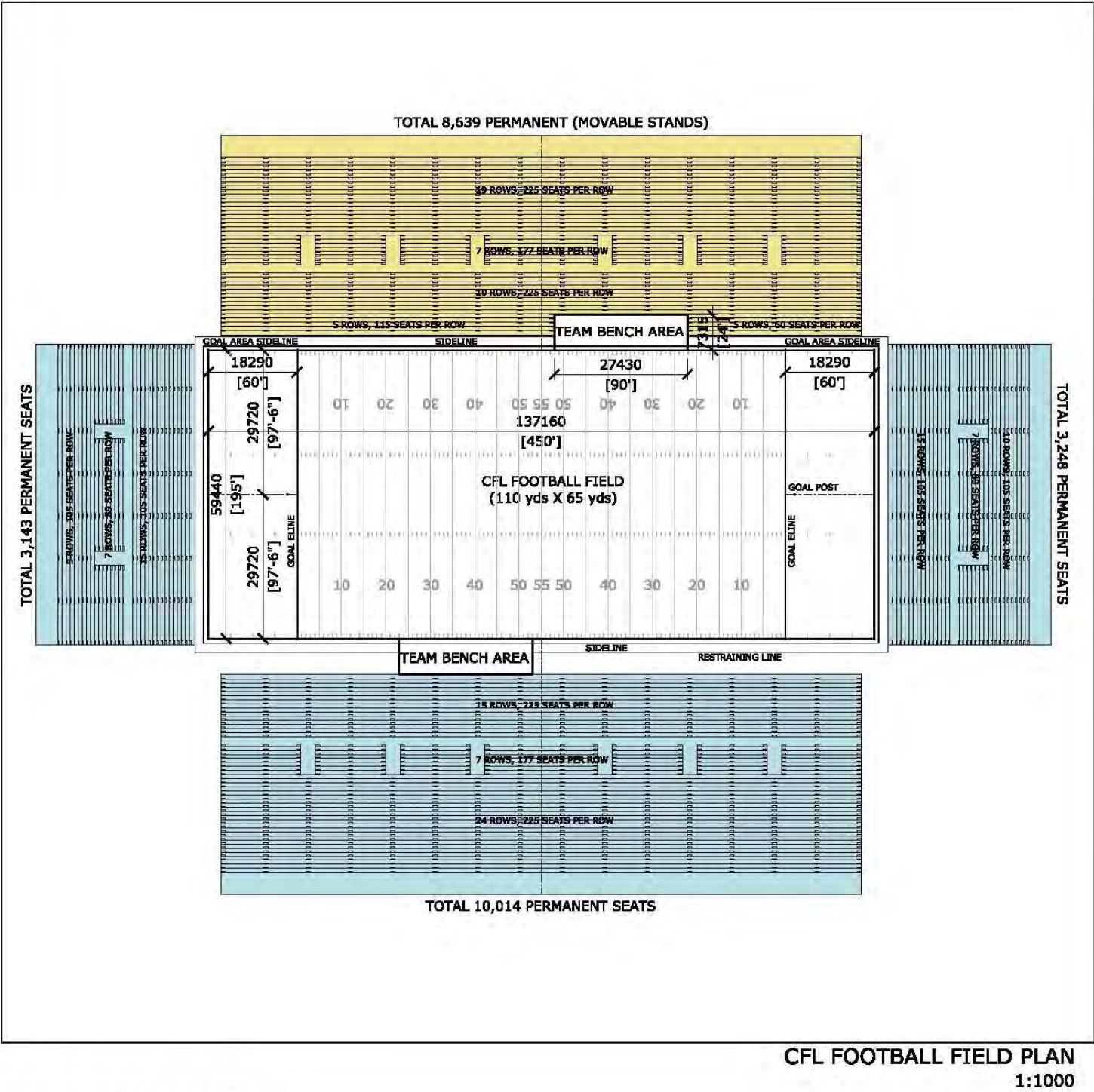
SCENARIO TWO (LEGACY)

SCHEMATIC CFL AND FIFA FIELDS STUDY  
JULY 4, 2011





Exhibit 37 Scenario 3



PERMANENT SEATS:	16,510
PERMANENT (MOVABLE STANDS):	8,639
TOTAL No. OF SEATS:	25,044

SCENARIO THREE

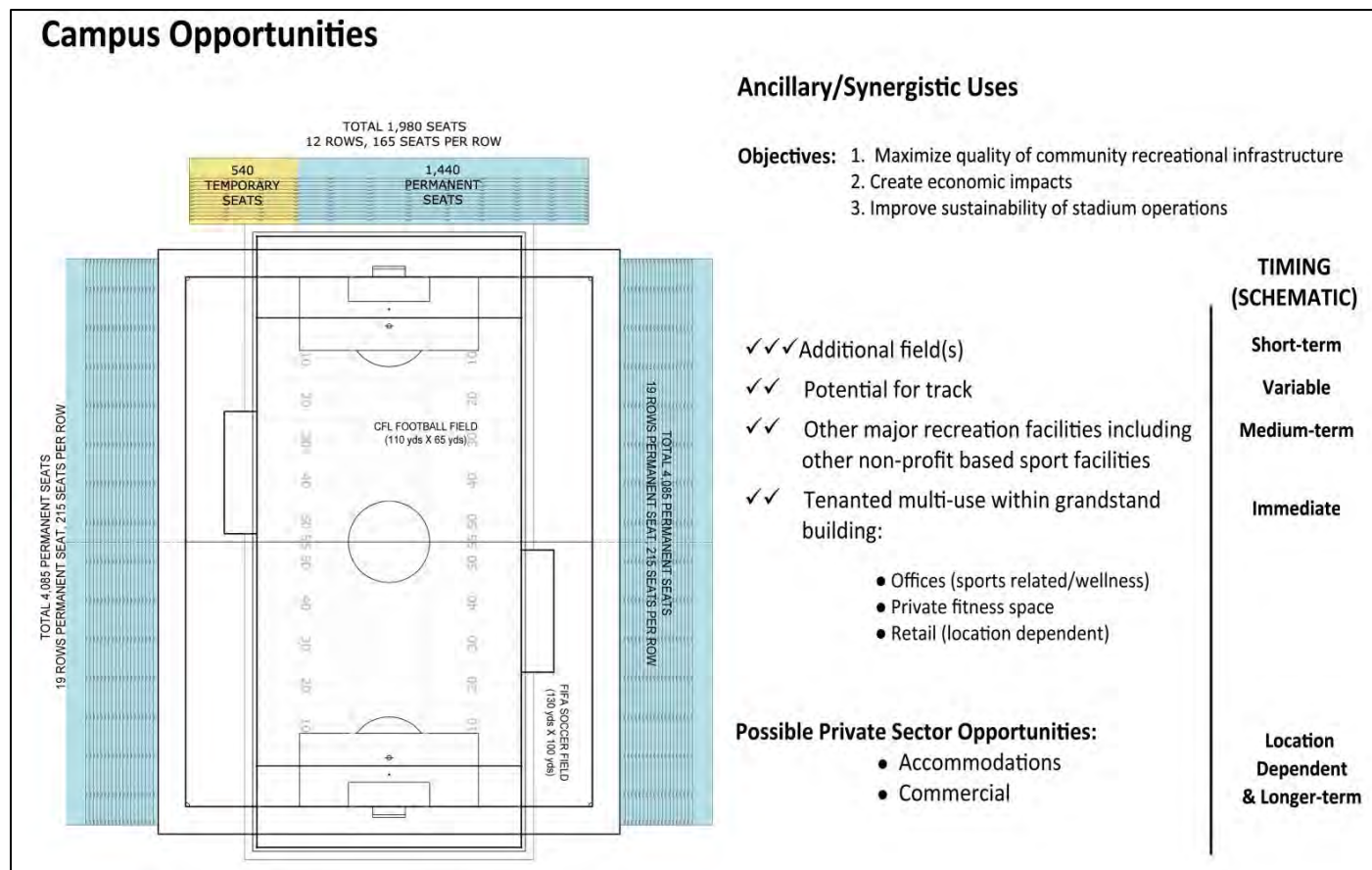
SCHEMATIC CFL FOOTBALL FIELD STUDY  
JULY 4, 2011



## 8.8 CAMPUS OPPORTUNITIES

The range of campus or precinct opportunities that may enable economies of scale as well as promote increased functionality for hosting tournaments, events and creating higher yield spending from visitors to the stadium are shown schematically below. Our opinion is that the Stadium will yield greatest impact if it is accompanied by essential supporting infrastructure search as additional playing fields and other recreation facilities.

**Exhibit 38 Campus Opportunities**



Should a candidate location offer the potential for a master planned development involving a range of higher order land uses including residential, retail and office, the potential exists to incentivise this wider development through creating the services (including roads) on site which also serve the stadium. Potential then may exist for value capture from private sector development in the form of increased property tax revenues which could, in theory, be applied to service the debt obligations for the stadium.

## 8.9 PARTNERSHIPS

### 8.9.1 SPORT ORGANIZATIONS AND INSTITUTIONAL USERS

The research program for this business case has included discussions with a number of organizations regarding their needs and opportunities attached to the stadium project. As a result, Phase 2 of the work program should seek further clarification of the potential for partnerships, their form and how these impact the Municipality.

Principal among these partnerships are those that provide either capital funding contributions, operating revenues, or result in operating cost savings.

### 8.9.2 FUNDING PARTNERSHIPS

#### Capital Funding Sources – Federal

The Federal government has two sources of funding for stadium/multi-use facilities: the P3 Canada Fund and the Building Canada Fund. Despite some speculation in the media that the Federal Government would change the funding criteria of the P3 Canada Fund or allow municipalities to use the gas tax fund in order to subsidize professional sports facilities, the government stated in early March 2011 that it will not make any program changes nor create new programs to fund new professional sports facilities.

#### *P3 Canada Fund*

The P3 Canada Fund helps finance public-private partnership (P3) infrastructure projects, and an eligible infrastructure category relates to sport infrastructure. Under that category, the P3 Canada Fund would support the development of sports facilities “excluding facilities used primarily by professional athletes.” Other eligible projects under the Sport Infrastructure category include:

- Community recreation spaces; and
- Fields and parks, fitness trails, bike paths and lanes, playgrounds, and other facilities

To receive funding from the P3 Canada Fund, projects require “meaningful” private sector involvement in at least two of the following: design, build, operation and/or maintenance, or finance. Additionally, the private sector must be involved in either the finance or operation.

“For the purposes of the P3 Canada Fund, “meaningful private sector involvement” will be interpreted as follows for each of the four structural elements:

- Design: The private sector will be responsible for all or almost all design activities;
- Build: The private sector will be responsible for all or almost all construction related activities;

- Operate: The private sector will be responsible for all or almost all activities related to the operation of the infrastructure asset; and
- Finance: The private sector will be responsible for arranging private financing that will be used to ensure performance during the construction and/or maintaining/operating period of the project.”

The maximum level of contribution given to an approved P3 project is 25% of the project’s eligible costs – either direct construction costs or development costs. Additionally, land and furnishing costs are not eligible costs. Funding support could be in the following forms: non-repayable contribution, repayable contribution, loan or loan guarantee.

### ***Building Canada Fund (BCF)***

A national infrastructure program, the BCF has a “Sport” category and a “Recreation” category. Under the Sport category, BCF funding will go toward projects that are designed to “provide increased opportunities for the development of Canadian athletes and/or the hosting of major amateur athletic events.” Under the Recreation category, the following infrastructure projects – relevant to our study – are eligible for funding:

- Large facilities or complexes which support physical activity such as arenas, gymnasiums, swimming pools, sports fields, tennis, basketball, volleyball or other sports-specific courts, or other facilities that have sport and or/physical activity as a primary rationale; and
- Community centres that offer programming to the community at large, including all segments of the population.

According to the Building Canada Plan Framework Agreement between Canada and Nova Scotia, the province will receive \$235.68 million over seven years under the Building Canada Fund until 2014. Of that amount, \$198.68 million will go to approved projects under the Major Infrastructure Component and \$37 million will go to projects under the Communities Component.

The Major Infrastructure Component is meant to fund infrastructure projects that “have a national, regional or provincial impact and generate significant benefits in terms of a growing economy, a cleaner environment or stronger communities.” Projects under the Communities Component must be located in areas that have a population of less than 100,000.

Funding for the Building Canada Fund (Communities Component) is fully committed as is funding for the Major Infrastructure Component.

### **Capital Funding Sources – Provincial**

The Canada-Nova Scotia Infrastructure Program is a \$195 million investment by the province and the Federal Government and municipalities to improve municipal infrastructure in the province. Funding has already been fully committed.

Nova Scotia also has capital grants for Sport and Recreation – such as the Recreation Facility Development (RFD) Program and Community Recreation Capital Grant Program (CRCG) – which is managed by the Department of Health and Wellness. These capital grant programs are not relevant for the purposes of this study because they mostly apply to smaller-scale projects.



## Operating Funding Sources – Provincial

Sport Nova Scotia has a number of grant programs, and the most relevant for our purposes would be the Nova Scotia Amateur Sport Fund – Community Sport Grants. This program allocates funds to sports organization but the fund is small and does not appear to be geared to stadium operations. It is meant to fund projects/initiatives that fulfill a need that is not addressed by existing programs.

The total Sport Fund is also relatively small at \$100,000 per fiscal year, and accepts applications twice each year, with submission deadlines of March 1 and September 1.

## 8.10 FINANCING SOURCES

There are a number of potential financing sources to meet the obligations of capital cost for the stadium. A number of municipalities have been innovative in their approach to identify multiple sources for financing large-scale capital properties of this nature. In a number of higher profile developments across North America, the development of master plan precincts have been used to provide the opportunity for commercial real estate development to generate revenues to cover debt obligations.

Typical categories of financing include the following:

Type of Financing	Likelihoods
<b>Upper level of government capital funding (grants)</b>	Addressed above
<b>Municipal debenture</b>	Scale of initial debenture depends on other capital funding sources committed prior to project construction; timing of debenture depends on project delivery model and role of private sector in financing project (if part of a P3 arrangement)
<b>Transfer of existing funding support for existing stadium</b>	Typically, where existing stadia or arenas which are being replaced have an annual subsidy (deficit), this pre-existing loss can be transferred to the new facility upon decommissioning of the old facility.  No pre-existing municipal stadium exists in HRM.
<b>Redevelopment of existing stadium site</b>	Similarly, decommissioned facilities provide redevelopment value, potentially significant and relatively near term in opportunity.  No pre-existing municipal stadium exists in HRM.
<b>Capitalization of naming rights (either by way of upfront contribution or ability for HRM to capitalize the staggered payments into a an upfront contribution</b>	Potentially significant naming rights are achievable in HRM given the appropriate location and quality of development, and event schedule. Naming rights would be significant if a professional sporting franchise was achieved.
<b>Ticket surcharge</b>	Can be applied to ticketed events each year.

Type of Financing	Likelihoods
<b>Redevelopment of lands adjacent to new stadium as part of master plan campus</b>	<p>Based on market conditions in HRM, the potential for office and hotel development is location specific. The opportunity may exist to trigger redevelopment of significant land holdings through infrastructure upgrades as part of the FIFA Stadium project. Resulting private sector development in the vicinity will generate property tax dollars.</p> <p>The Municipality could create a Tax Increment Financing (TIF) mechanism to fund capital debt obligation from such future tax receipts.</p>

Additional other funding sources which have been used recently include the following:

- Allocation of destination marketing fee (hotel levy) – a number of examples exist whereby the use of a portion of this levy for capital investment which supports the tourism destination objectives of the community;
- Funding by other partner groups which have identified potential benefits of the project. This may include levies on downtown business associations and other groups and will be entirely dependent on the location of the stadium as well as the existence of such designated districts which can potentially reap a material benefit from the public investment in the stadium; and
- Diversion of parking revenues.



## 9 ASSESSMENT OF PROJECT DELIVERY OPTIONS

Per the Phase 1 Stadium Analysis study requirements to address facility ownership, operating and funding models, the following is an assessment of project delivery and operating models.

The range of means to deliver large scale municipal capital projects has evolved in recent years. No longer are the options restricted to traditional public sector procurement, ownership and operation approaches, but a range of alternative financing and procurement (AFP) models have been implemented by jurisdictions throughout Canada and elsewhere. The determination of which method of project delivery is most appropriate is, in most cases, a case-specific exercise in establishing the objectives of the project, the risks associated with the delivery and ongoing operation, and the range of opportunities for these risks to be shared by both the private and public sectors.

The following discussion of project delivery partnership options is focused on the development of the real estate asset and its ongoing operation. We therefore distinguish principally between the private sector and the public sector. The potential for other partnerships in funding and operating the facility, such as with educational institutions as well as national, provincial and local sports organizations is another important opportunity.

A multi-use sports stadium developed in HRM will function as a community facility as well as an event centre. As such, the analysis assumes that the Municipality will retain ownership of the facility as well as retain control over the programming of the facility. Flexibility to achieve its mandate as a regional, provincial and, on occasion, international events centre dictates that HRM maintain a central force in the operation of the stadium.

There are a number of ways to achieve this outcome, including:

1. The traditional approach to facility procurement; and
2. A variety of forms of public private partnership (PPP or P3s).

### ***The Traditional Public Procurement Approach***

In the traditional municipal procurement method, municipal or other public sector funds are used to fund capital construction costs and the municipality is responsible for facility operation, maintenance and life cycle works.

Public Sector Owner (HRM)	A - Design Development
	B - Construction Tenders
	C - Operation and Maintenance Control & use of Contract Suppliers

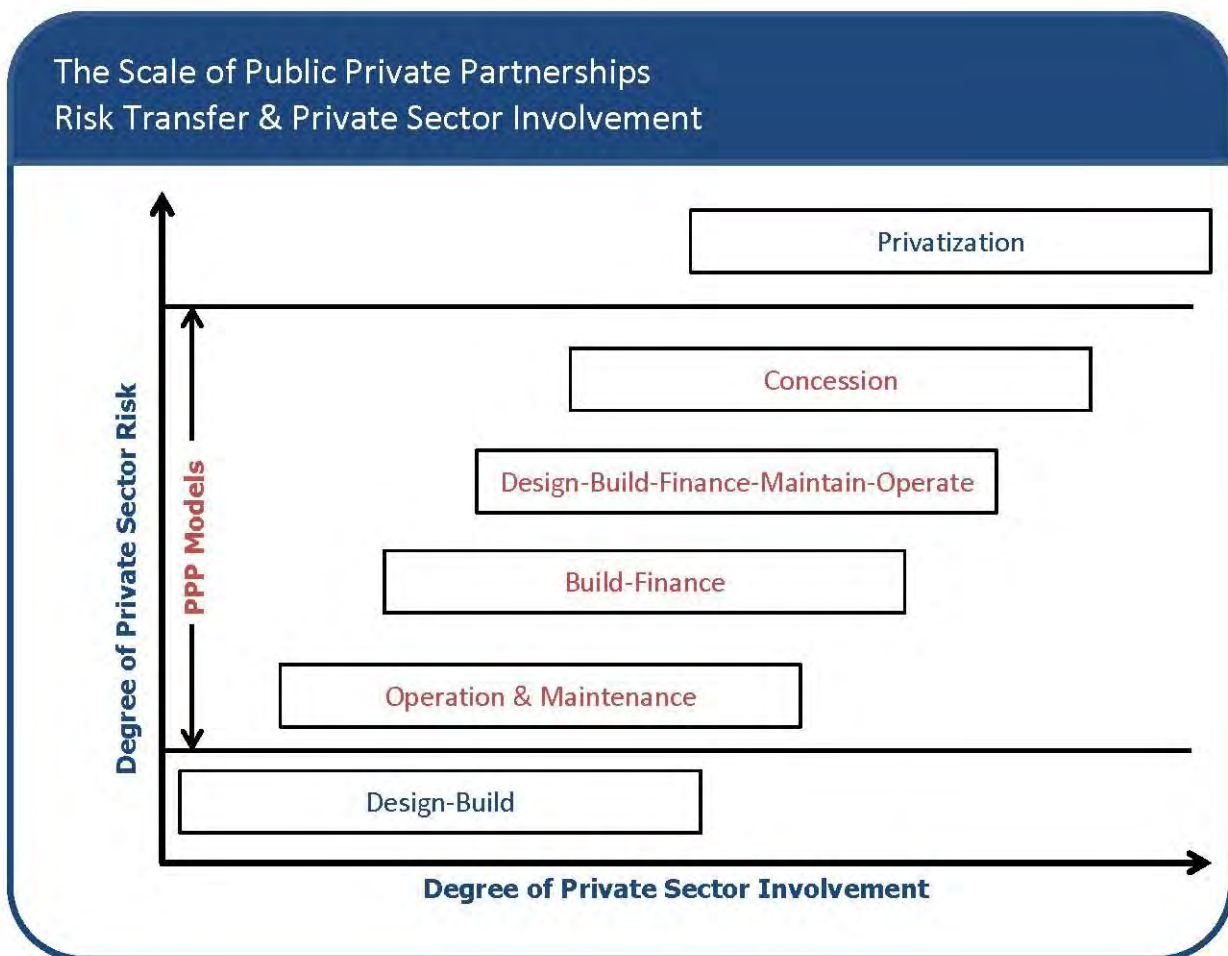
Under the traditional approach, the public sector owner of the facility separates out the components of project design construction and delivery, through one or more design development contracts, and a series of construction tenders, managed by a project manager contracted by the municipality.

The operation and maintenance of the facility is the responsibility of the Municipality with necessary short-term contracts with private sector companies to provide supplies and specific services. Under this model, the municipality has 100% control of the facility, its financing and requirements, operations and therefore assumes all risks associated with the project including any delays or cost overage prior to completion, and any ongoing operating liabilities (financial or otherwise) during the operation phase of the project.

### ***The Range of P3 Options***

Several essential principles define public private partnerships and the reasons that municipalities and other public sector organizations seek these models:

1. Involving the private sector in project delivery and/or operations enables the transfer of risks to the private sector while also providing the necessary profit incentive for the private sector;
2. Partnerships are based on reducing overall costs both in the short term and over the long term;
3. Roles and responsibilities reflect the relative expertise of the public vs. private sector parties; and
4. The arrangement potentially frees-up scarce public sector resources.



Source: The Canadian Council for Public-Private Partnerships

The extent of the private sector involvement and therefore the degree of project risk transferred to the private sector varies depending on the type of private sector partnership. In this first limited form, the involvement of the private sector is in the provision of the design-build services whereby the design and construction (not necessarily the financing) is undertaken by the private sector. Ownership and operation of the facility when complete remains with the public sector. At the other end of the spectrum is full out privatization whereby the private sector fully substitutes the public sector in the provision of the facility, service or other activity under consideration. Between these two limits, lie a range of risk transfer mechanisms which have proven valuable to a number of municipalities in the delivery of large scale, long term capital facilities.

A brief explanation of some of the terms includes the following:

- Operation and maintenance (O&M) – involves a private sector operator managing a facility owned by the private sector on the basis of a specific contract for a specified term, while ownership of the asset remains with the public sector;
- Build-Finance is a condition where the private sector builds and finances the construction of a capital asset during the construction period only. Following this, the responsibility for the repayment of the capital cost and the operation of the facility resides with the public sector only;

- Design-build-finance-maintain (DBFM) – this is often considered a true and complete form of public private partnership whereby a municipal capital facility is designed, constructed, financed, maintained and (sometimes) operated by the private sector on behalf of the municipality or other public sector organization which has the use of the facility. A variation is design-build-finance-maintain only, whereby for project-specific reasons, operation of the facility resides with the public sector; and
- Concession – a full private sector solution to public sector requirements. This also involves a level of control residing with a private sector with the adoption with the significant majority of project-related risks over a specified concession period (usually a significant period such as 30 years). This method is often used for large scale municipal capital facilities as well as transportation infrastructure.

The application of these broad models to the proposed stadium project in HRM should be based on an agreed set of principles established by the Municipality prior to the next phase of the project implementation.

## 9.1 SOME SPECIFIC CONSIDERATIONS

### 9.1.1 CONSIDERATIONS FOR HRM

The objectives of HRM as it relates to the appropriate ownership and governance model for this facility are assumed to include the following:

1. A desire to maintain control of the asset and a preference for ownership. This includes the recognition that any portion of the capital cost funded by the Municipality through tax supported means would, we understand, necessitate ownership by the Municipality;
2. The desire for the most efficient and cost effective form of delivery of the asset (its design and construction) with due regard to the timelines proposed by the FIFA 2015 women's world cup and test event to be held in the summer of 2014;
3. The previous experience of HRM, and level of comfort with, design-build procurement, and third party operation of community facilities;
4. Presence of professional expertise within the corporation, its agencies, and a wider community which may offer a specific solution for partnering in facility operations; and
5. Notwithstanding the immediate mandate of the facility as a multi-use community recreation asset, maximize revenue generation and opportunity to host major events within a signature spectator facility in Atlantic Canada.

### 9.1.2 CONSIDERATIONS FOR PRIVATE SECTOR AND OTHER PROPONENTS

1. The need to ensure profit and return on investment; and
2. To minimize financial risks and other liabilities.

### 9.1.3 ASSUMPTIONS OF THE PROJECT DELIVERY, OWNERSHIP AND OPERATIONS MODEL

The following assumptions are the basis for the alternative ownership and operations models presented in this report:

1. At day 1, absence of a primary anchor tenant as a primary revenue generator for the facility;
2. An ongoing community-use mandate for the facility which should include use of the facility (or parts thereof) on a year-round basis;
3. Leverage the facility as a significant element of the Municipal and the Regional hosting infrastructure;
4. Design-build is the most effective and risk minimizing construction method;
5. HRM financing policies and regulations dictate that the Municipality retain ownership of the asset unless the Municipality is not required to contribute to the capital costs of the project;
6. Given the aspirations for the facility to be a prestigious venue to accommodate major attractions, the management of the facility (operations, programming and marketing) should represent a customized approach designed to maximize the potential associated with this facility. This necessitates a third-party performance – oriented management entity to oversee operation of the facility. The management entity will be under contract to the HRM;
7. While alternative financing options may exist, the essential distinction is between the lower costs of long-term financing by the Municipality vs. higher financing costs for long-term debt if secured by the private sector. The significance of this cost depends on the scale of capital costs which are to be financed through debt;
8. If the Municipality enters into a partnership model whereby financing was retained by a private sector partner, financing would be non-recourse to the Municipality;
9. Structure a partnership model that meets the opportunity to secure private funding such as through as the P3 Canada funding model<sup>9</sup>; and
10. Recognition that the initial model of ownership and operation is subject to change in the future if a franchised-anchor tenant opportunity arises (such as a CFL, MLS or other franchise).

<sup>9</sup> There are a number of mechanisms by which to meet the requirements of securing a private sector partner to the project for the purposes of meeting the eligibility requirements of the P3 Canada model. This can involve both equity and financing contributions by the private sector, and can include both short term and longer term financing. This provides considerable flexible to securing a private sector partner for the project.

## 9.2 RESULTING OWNERSHIP/OPERATING MODELS

Based on the preceding analysis the merits of the potential P3 models are presented below based specifically on project objectives and business case for the Halifax stadium over both the short and medium term.

### **Privatization**

Based on the anticipated financial performance of the facility and its community mandate, a business case for full privatization (outsourcing) of the facility to the private sector is not apparent.

The provisions of development rights surrounding the stadium (if attainable) may provide some potential for private sector capital contribution in the form of property tax revenues generated from real estate development and capitalized upfront through a TIF mechanism.

### ***Concession (Private Sector Concessionaire that Invests in and Operates the Facility Following Which Ownership Reverts to Private Sector)***

The anticipated financial performance of the facility (excluding debt obligations) is unlikely to make a concession model attractive to the private sector. This model may be of greater relevance if a major sports franchise anchors the facility.

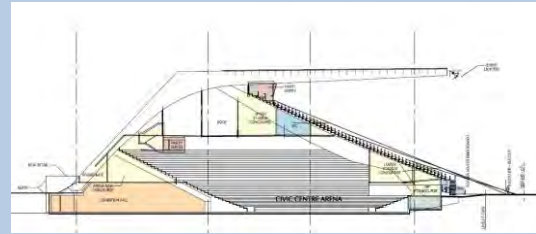
### ***Design-Build-Finance-Maintain-Operate (DBFMO)***

This option and its variant DBFM (property management but no operating and programming responsibility) has some potential but typically these arrangements anticipate a long-term relationship for both financing and services which may not be in the interest of the HRM given the evolving nature of the facility over time in terms of its function and potentially additional on-site development. Shorter term DBFM contracts may not provide a competitive rate of financing, particularly for a facility which lacks an anchor tenant.

### ***Design-Build-Operate (No Capital Burden on Private Partner)***

Under this approach, private sector – build team comprising of general contractor, architectural firm, and required sub-disciplines that would design and

#### Lansdowne Park Stadium Transformation, City of Ottawa Real Estate-Backed Formula



- The City of Ottawa remains owner of the stadium and all lands associated with the redevelopment of Lansdowne Park.
- Includes stadium development and significant commercial, residential, and retail development.
- The essential business model is that of a partnership between the City of Ottawa and the Ottawa Sports and Entertainment Group (OSEG) – with a 30 year head lease agreement with OSEG requiring OSEG to undertake redevelopment and construction assuming all risks for redevelopment as well as risk for operating revenues and expenses.
- In return, the City contributes the capital required for the redevelopment of the stadium and additional parking, while OSEG (private development group) funds the associated retail development.
- The City intends to take the incremental tax gain on the associated real estate development and allocate this to debt service. A similar approach has been undertaken in recent projects elsewhere in Canada including plans for a new NHL arena in downtown Edmonton, promoted and financed largely by the private sector with land value and tax gains from redevelopment of the existing site representing the City contribution.
- In addition, the City's existing obligations to the aging stadium are carried over as contribution to debt service for the revitalization (\$3.8 million annually based on an annual operating net loss of \$650,000, a minor capital per annum of \$750,000 and annual life cycle costs over a 30 year period of \$3.4 million).
- Project is approved in principle, based on a revenue neutral funding formula for the City (representing no new additional net tax burden).

construct the entire facility as a turnkey project. The risks associated with access capital costs and delayed timing is reduced through a design build agreement with a gross maximum price (GMP).

The operations of the facility are assumed to be undertaken by a third party management team under contract to the Municipality which includes a base fee plus performance incentives. The benefit of third party management lies in the expertise that can be brought to facility as well as some modest transfer operating risks to the third party managers. Contracts can include both penalties of both non-performance of target revenues or facility cost control, as well as performance rewards for exceeding revenue growth and/or cost redemption.

### ***Lease-operate***

A variant to DBO is the lease of the facility for a specified period to a private operator with the required guarantees that the Municipality buys programming time for a set period and at a set rate plus indexation to ensure that the private operator is able to meet their business model requirements. This approach is pursued with a number of recreational and municipal assets including hockey arenas, various utilities as well as institutional buildings.

The Halifax stadium does not constitute a standardized business enterprise – it is a mix of community facility and event venue and is expected to evolve over time both in form and function. Given this, the restrictions imposed by a lease-operate arrangement may not be in the interest of the Municipality over the long-term.

The risks associated with this approach are a loss of management control of the facility and therefore the loss of flexibility to evolve a venue in a way which maximizes its potential. Therefore, third party management is important to bring in specific expertise and provide a focus on bottom-line financial performance, while municipal control over the strategic direction for the facility as well as ongoing programming is also an essential feature of the operations model.

The above operating models including concessions and lease-operator arrangements are often more appropriate where a facility has standardized programming or where the evolution of the facility and its function is already accounted for in the business plan underlying the contractual arrangements.

Based on the above, the most appropriate range of options for ownership and operation of this facility as at Day 1 (legacy mode following the FIFA world cup event in 2015) is as follows:

1. Municipal ownership and operation;
2. Municipal ownership of the facility and third party management of the operations. Management is provided on a fee for service basis with performance provisions built into the contract. Base line operating risk is assumed by the Municipality as owner of the facility; and
3. In both cases, the design build procurement model is preferred. As the financial analysis contained in this report demonstrates that there is a likelihood that the private sector operation of the facility will result in high revenues and the potential reduction in fixed operating costs.

The preferred approach is that of third party management, potentially utilizing the strategic advantages of TCL.



## 10 ASSESSMENT OF STADIUM OPERATING REVENUES AND EXPENSES

### 10.1 BASELINE ASSUMPTIONS

The assessment of operating revenues and expenses is predicated on the absence of a professional sporting franchise. Furthermore, it assumes the development of a stadium of 10,000 + permanent seats. The basis for 10,000 permanent seats relies on our review of the market as well as the opportunities for achieving cost effective expansion of the facility in the future.

The relationship between the permanent seat count and the operating revenues and expenses is not proportional. The incremental addition of permanent seats can be achieved at relatively modest prices and does not equate to significant increase in operating costs. The scale of addition where this is likely to be the case is likely limited to 3,000 to 4,000 seats. Hence, it is a viable option to construct a higher permanent seat count (in the order of 13,000 to 14,000 seats). Whilst incurring a higher initial capital cost, this would not translate into an unduly significant increases in operating costs, as the majority of operating costs are fixed and those which are variable (such as event related costs) are a function of attendance rather than the actual seat count of the facility itself. It is possible that with the additional incremental capital cost to achieve greater than 10,000 permanent seats, the facility could either attract additional events or solidify its competitive position in Atlantic Canada. In addition, the higher permanent seat count translates into a lower temporary seat cost for those events which are successfully attracted to the facility and which require temporary seats to achieve the desired additional capacity.

Factors to consider regarding additional permanent seats beyond the recommended complement of 10,000 include the following:

- The availability of capital funding to pay for the incremental addition and whether all or a portion of those costs would be a burden on the municipal tax base;
- The depreciation of the additional capital asset over time;
- Whether the additional seats would represent permanent or throw away items in the event of a major facility expansion to house a professional sporting franchise; and
- In the interim, public attitude and tolerance towards a stadium with seating capacity which is likely only to be required on a highly infrequent basis.

### 10.2 SCENARIOS CONSIDERED

The assessment of indicative financial performance of the stadium is based on two scenarios:

- **Scenario 1** – The Base Case which includes significantly discounted revenues to reflect potential risk associated with the achievement of some of these revenues, as well as the full range of operating costs expected for a facility operating as a stand-alone building with limited opportunities for staffing and other efficiencies;
- **Scenario 2** – Sensitivity analysis employs both changes to the revenue equation (plus and minus) as well as cost profile of the facility to demonstrate the balance of factors which can impact the Net Operating position.



In both cases, assumptions regarding the number of events, scale of attendance, and rental rates for the field and building remain unaltered and represent the most appropriate base of market assumptions.

### 10.3 SCENARIO 1: BASE CASE

#### 10.3.1 FIELD REVENUE SOURCES

The baseline analysis includes both revenues from programming during the Spring/Fall period as well as during the winter months with an air supported bubble. The premium quality of the facility supports a different approach to the pricing of this field. Based on the 2011 rates of \$118/hr. for a full artificial field, the analysis conservatively increases this by a factor of 25%. Given that the facility is available for community use for 2014 onward, it is likely that fee increases would have occurred in the interim. Therefore the estimated rate of \$147.50 is in our view likely conservative and should be increased to reflect escalation as well as the premium quality of the field. Based on this, there is capacity for over \$200,000 revenue to be achieved during the spring to fall period. This is equivalent to a large portion of the overall sports field revenue which HRM currently achieves, but the field itself does not divert significant usage from those existing fields. The full programming of the Spring/Fall period (1,500 hrs.) represents only 5% of total usage booked in HRM as of 2009. Overtime, as the need increases, a proportion of all programming accounted for by the stadium can be expected to decline.

For context and comparison, the exhibit below illustrates the annual usage of the top used artificial turf facilities in HRM relative to estimated field usage of a potential new stadium. The usage figures of each HRM facility includes sports usage of all types (soccer, football, lacrosse, rugby, ultimate frisbee, etc.).

Stadium Field Programming Impact		
<i>Total HRM Sportfield and Artificial Turf Usage (2009):</i>		<i>30,172 hours</i>
HRM Facility Name	Annual Usage in Hours (2009)	Proportion of Total Sportfield and Artificial Turf Usage
Dartmouth Sportfield 1	1,707	5.7%
Halifax Sportfield 1	1,623	5.4%
Dartmouth Sportfield2	1,556	5.2%
Halifax Sportfield 2	1,533	5.1%
<b>Estimated Stadium Annual Field Usage</b>	<b>1,500</b>	<b>5%</b>

Winter bubbling has the potential to draw significant revenues which can make an important difference to the level of deficit required by this facility, creating a 12 month program for the facility as a whole. The balance is in achieving a level of revenue based on meeting largely unmet market demand. Scenario 1 financial modelling assumes that the winter bubble is moderately programmed in prime time (75%). The resulting revenues are subject to a risk discount of 50% which reflects the potential for competition with existing indoor soccer facilities in the absence of a defined location for the stadium in HRM. Assuming the location limits the extent of competition and serves the expanding demand for indoor use, this discount should be removed (Scenario 2).

In Scenario 1, the result is a conservative assessment in winter bubbling revenues which takes into account these various factors. The total revenue is approximately \$245,000 per annum. Given that bubbling costs

(set up and take down) can be in excess of \$100,000 based on our experience of other facilities, the next revenue from winter bubbling is modest and can likely be significantly enhanced.

#### **10.3.2 BUILDING-RELATED REVENUE BASE**

The provision of a main grandstand to house building functions and rentable floor space has the capacity to generate market revenues in addition to the use of the field. This is based on a 12 month per year operation of certain of the building elements including leasable space in the order of just under 50% of the useable floor space.

Advertising revenues are estimated conservatively given the lack of a professional sports anchor tenant but the expectation of a high degree of community use provides incentives to generate a modest fee from advertising.

Net revenues (after cost of goods sold) from event concessions at the facility are assessed on a conservative basis. Significant spending on merchandising for example is limited to those events which are ticketed. While the calendar of events is not expected to be similar in each year, the financial analysis is required to blend out these relatively lumpy event revenues year to year. Accordingly, the resulting average annual concession revenues for the facility are modest.

**Exhibit 39: Revenues Under Scenario 1 Base Case**

		Year 1	Year 2	Year 3	Year 4	Year 5
<i>Escalation (p.a.)</i>	3%	1.00	1.03	1.06	1.09	1.13
<b>Revenue</b>						
Field Revenue						
Field Revenue - Spring- Fall Prime time		\$221,250	\$227,888	\$234,724	\$241,766	\$249,019
Field Revenue - Spring- Fall Non-Prime time		\$55,200	\$56,856	\$58,562	\$60,319	\$62,128
Field Revenue - Winter Bubble - Prime time		\$145,800	\$150,174	\$154,679	\$159,320	\$164,099
Field Revenue - Winter Bubble - Non-Prime time		\$101,300	\$104,339	\$107,469	\$110,693	\$114,014
Annual Ticketed Events		\$447,681	\$461,112	\$474,945	\$489,193	\$503,869
<b>Total Field Related Revenue</b>		<b>\$971,231</b>	<b>\$1,000,368</b>	<b>\$1,030,379</b>	<b>\$1,061,291</b>	<b>\$1,093,129</b>
Building-Related						
Event Related Concessions (Gross)		\$265,000	\$272,950	\$281,139	\$289,573	\$298,260
Merchandising and Novelties (Gross)		\$97,500	\$100,425	\$103,438	\$106,541	\$109,737
Other F&B - Daily use (Gross)		\$73,800	\$76,014	\$78,294	\$80,643	\$83,063
Advertising		\$54,750	\$56,393	\$58,084	\$59,827	\$61,622
Naming Rights		\$50,000	\$51,500	\$53,045	\$54,636	\$56,275
Lease Space Net Rent		\$199,500	\$199,500	\$199,500	\$199,500	\$199,500
<b>Total Building Related</b>		<b>\$740,550</b>	<b>\$756,782</b>	<b>\$773,500</b>	<b>\$790,720</b>	<b>\$808,457</b>
<b>Total Revenue</b>		<b>\$1,711,781</b>	<b>\$1,757,150</b>	<b>\$1,803,879</b>	<b>\$1,852,011</b>	<b>\$1,901,586</b>
Direct Expenses (cost of sales incl. ticketing service)		(\$307,408)	(\$316,630)	(\$326,129)	(\$335,912)	(\$345,990)
<b>Gross Margin</b>		<b>\$1,404,374</b>	<b>\$1,440,520</b>	<b>\$1,477,751</b>	<b>\$1,516,098</b>	<b>\$1,555,596</b>

**10.3.3 TICKETED EVENTS**

The major events which are competitive bids such as the FIFA 2015 World Cup and various other international and national tournaments are assumed to create cost structures broadly in proportion to the direct revenue base achieved on gate revenues. For purposes of the financial analysis, therefore these individual events (the certainty of which is unknown) are on a breakeven basis with no net incremental impact on the financial performance of the facility. Whilst this is a limitation of the analysis, it should be recognized that the staging of any major event represents a risk as well as opportunity to maximize facility revenues.

In order to provide a clear indication of those events which remain occasional but have a greater likelihood of being staged at the stadium on a semi-regular basis, we have restricted the revenue analysis to only those events which are ticketed and generate gate receipts to offset the event related costs. This includes both soccer and football elements. We have restricted the analysis to these ticketed events given the uncertain nature of lacrosse, field hockey and rugby in terms of their likelihood of staging national or international events in HRM on a semi regular basis. Based on moderate assumptions regarding attendance as well as ticket price increments, these events generate moderate revenues to the facility (approximately 1/4 of total revenues). By limiting the range of events which are assumed to occur regularly at the facility, this revenue figure is already risk - adjusted such that the gross ticket revenues represents an achievable amount.

Should events fail to materialize; the loss of revenue will be offset by reductions in event-related costs, including part-time staffing.

**10.3.4 ENTERTAINMENT EVENTS**

Based on our analysis of the opportunity for non-sports related entertainment or cultural events at the stadium, we have assumed that the facility is used once every three years or thereabouts. Given the nature of the use, the analysis assumes a simple rent agreement with the facility receiving rent for number of days required to host (setup and take down) the event based on a competitive rental rate. Given the low frequency of the events, this represents only a marginal benefit to the revenue base.

### 10.3.5 EXPENSES

Total annual expenses before management fee and capital reserve are shown below at just under \$1.4 million.

#### Exhibit 40: Scenario 1 Base Case

		Year 1	Year 2	Year 3	Year 4	Year 5
<i>Escalation (p.a.)</i>	3%	1.00	1.03	1.06	1.09	1.13
<b>Facility Expenses</b>						
Payroll (Labour)		(\$651,630)	(\$671,179)	(\$691,314)	(\$712,054)	(\$733,415)
Utilities		(\$334,625)	(\$344,664)	(\$355,004)	(\$365,654)	(\$376,623)
Operating, Maintenance and Repair (incl. purchased supplies)		(\$209,600)	(\$215,888)	(\$222,365)	(\$229,036)	(\$235,907)
Marketing		(\$20,000)	(\$20,600)	(\$21,218)	(\$21,855)	(\$22,510)
Insurance		(\$50,000)	(\$51,500)	(\$53,045)	(\$54,636)	(\$56,275)
Winterization of Stands and Set-Up/Take-Down of Bubble		(\$110,000)	(\$113,300)	(\$116,699)	(\$120,200)	(\$123,806)
Professional Development and Travel		(\$20,000)	(\$20,600)	(\$21,218)	(\$21,855)	(\$22,510)
Realty Taxes		\$0	\$0	\$0	\$0	\$0
<b>Total Expenses (Excl. Management Fee and Capital Reserve)</b>		<b>(\$1,395,855)</b>	<b>(\$1,437,731)</b>	<b>(\$1,480,863)</b>	<b>(\$1,525,288)</b>	<b>(\$1,571,047)</b>

### 10.3.6 MANAGEMENT FEE AND CAPITAL RESERVE

The capital reserve contribution is based on a portion of capital costs and is comparable in this regard to other recently developed facilities both in the City and in other jurisdictions. The assumptions regarding the capital reserve are as follows:

- The amount represents a meaningful scale of diversion of net operating income (irrespective of whether the facility is operating in deficit or surplus) in order to plan for major life cycle capital repairs to the facility over its anticipated lifetime;
- The amount is diverted in full beginning in Year 1 rather than being phased in over several years. Note that the illustrative proforma is based on the assumption of normalized operations as at Year 1. This may be a limiting assumption as it is likely that operating revenues and costs will be ramped up over several years from opening of the facility to year 3 or 4 depending on how quickly the facility develops a stable annual event program.

The management fee is based on a 12 month operation with standard industry rates applying. If the winter use of the facility (the bubble) is eliminated, the management fee component of the expenses should also be similarly reduced to reflect partial operation of the facility.

### 10.3.7 COST SAVINGS FROM CO-LOCATION OF HRM FACILITIES

The analysis does not include provision for cost efficiencies which may exist from sharing staff resources between facilities. However, the significant costs associated with building operations and staffing suggests

that potential exists for reducing operating costs by co-locating municipal capital facilities. As indicated earlier, a number of venues including BMO field and others share staff resources between nearby facilities under the same management.

### 10.3.8 SUMMARY OF FINANCIAL PERFORMANCE

#### Exhibit 41: Scenario 1 Base Case

		Year 1	Year 2	Year 3	Year 4	Year 5
Escalation (p.a.)	3%	1.00	1.03	1.06	1.09	1.13
Net Income (NOI) Before Management Fee and Capital Reserve		\$8,519	\$2,789	(\$3,112)	(\$9,190)	(\$15,451)
Management Fee		(\$200,000)	(\$206,000)	(\$212,180)	(\$218,545)	(\$225,102)
Capital Reserve		(\$280,000)	(\$280,000)	(\$280,000)	(\$280,000)	(\$280,000)
NOI after Capital Reserve		(\$471,481)	(\$483,211)	(\$495,292)	(\$507,736)	(\$520,553)

PV of Operating Income: Discount Rate		
NOI before Fees and Capital Reserve	7%	(\$31,268)
NOI after Management Fee and Capital Reserve	7%	(\$5,663,924)

The results indicate a deficit to the facility. Assuming normalized in Year 1 (a simplified assumption) and based on the range of assumptions underlying the estimate of revenues and costs (see Appendix F), the facility can be expected to achieve a break-even net operating income *before management fee and capital reserve*. This is based on the inclusion of limited bubble revenues as well as the achievement of ticketed events at the stadium. These are reasonable assumptions for purposes of the business plan in the absence of a professional sporting franchise and are conservative in nature. The addition of management fees (\$200,000) and capital reserve contribution (\$280,000) increases the deficit to \$472,000 in year 1 (normalized). The deficit is approximately \$190,000 before capital reserve contribution.

A number of jurisdictions have taken a phased approach to the capital reserve contribution, ramping this up gradually over the first 10 years to achieve the desired level of annual contribution in year 11 onwards.

In terms of the present value of a deficit over a 20 year period, the net operating income before management fee and capital reserve returns a present value of approximately \$31,000. NOI after management fees and capital reserve significantly increases the deficit to over \$5.7 million in present value (as of the beginning of year 1 of operations).

Scenario 1 represents a worst-case scenario for a facility that draws revenue from both the community recreation market and several significant ticketed events annually. The resulting financial performance is predicated on highly conservative estimates of revenue from key sources.

## 10.4 SCENARIO 2 (SENSITIVITY ANALYSIS)

Scenario 2 provides further illustration of the impacts of reducing the risks associated with the operations at the Stadium. The revenue base includes both increases in direct rental revenue from winter use of the

facility, but moderates revenue from other sources such as building space rentals, as well as event concessions. The details of these altered assumptions are provided below.

#### 10.4.1 REVENUES

Scenario 2 includes the following assumptions with regard to higher revenues:

- Winter bubble revenues are achievable based on a 75% utilization for weekly prime time over a 4 month period (Scenario 1 Base Case discounted these by 50%);
- Naming rights are increased to an annual estimate of \$100,000 per annum;
- Occupancy of building rental space is increased from 60% in the base case (Scenario 1) to 70% in Scenario 2).

Scenario 2 includes the following assumption with regard to lower revenues:

- The transfer of operating risks for concessions (food and beverage and merchandizing) to a private operator(s). Accordingly, the cost of sales and 100% of the revenue yield are captured by the private operator. In exchange, the facility receives 25% of net operating revenues from concessions as a yearly rental fee (which can be further stipulated as a fixed base amount plus performance share of the net revenues from operating concessions).

It should be noted that the revenue base for the facility emanating from leasable space as well as naming rights, can be expected to vary considerably based on the location of the facility. The Phase 1 business planning process uses generic assumptions of lease rate, occupancy and likely scale of naming rights.

**Exhibit 42: Revenues Under Scenario 2 Base Case**

		Year 1	Year 2	Year 3	Year 4	Year 5
<i>Escalation (p.a.)</i>	3%	1.00	1.03	1.06	1.09	1.13
<b>Revenue</b>						
Field Revenue						
Field Revenue - Spring- Fall Prime time		\$221,250	\$227,888	\$234,724	\$241,766	\$249,019
Field Revenue - Spring- Fall Non-Prime time		\$55,200	\$56,856	\$58,562	\$60,319	\$62,128
Field Revenue - Winter Bubble - Prime time		\$291,600	\$300,348	\$309,358	\$318,639	\$328,198
Field Revenue - Winter Bubble - Non-Prime time		\$112,600	\$115,978	\$119,457	\$123,041	\$126,732
Annual Ticketed Events		\$447,681	\$461,112	\$474,945	\$489,193	\$503,869
<b>Total Field Related Revenue</b>		<b>\$1,128,331</b>	<b>\$1,162,181</b>	<b>\$1,197,047</b>	<b>\$1,232,958</b>	<b>\$1,269,947</b>
Building-Related						
Event Related Concessions (% of Gross)		\$23,188	\$23,883	\$24,600	\$25,338	\$26,098
Merchandising and Novelties (% of Gross)		\$8,531	\$8,787	\$9,051	\$9,322	\$9,602
Other F&B - Daily use (Gross) (% of Gross)		\$6,458	\$6,651	\$6,851	\$7,056	\$7,268
Advertising		\$54,750	\$56,393	\$58,084	\$59,827	\$61,622
Naming Rights		\$100,000	\$103,000	\$106,090	\$109,273	\$112,551
Lease Space Net Rent		\$232,750	\$232,750	\$232,750	\$232,750	\$232,750
<b>Total Building Related</b>		<b>\$425,676</b>	<b>\$431,464</b>	<b>\$437,425</b>	<b>\$443,566</b>	<b>\$449,890</b>
<b>Total Revenue</b>		<b>\$1,554,008</b>	<b>\$1,593,645</b>	<b>\$1,634,472</b>	<b>\$1,676,524</b>	<b>\$1,719,837</b>
Direct Expenses (ticketing service)		(\$23,813)	(\$24,527)	(\$25,263)	(\$26,021)	(\$26,801)
<b>Gross Margin</b>		<b>\$1,530,195</b>	<b>\$1,569,118</b>	<b>\$1,609,209</b>	<b>\$1,650,503</b>	<b>\$1,693,036</b>

**10.4.2 EXPENSES**

Expenses are reduced only by the extent of insurance costs. Scenario 2 assumes that HRM's umbrella insurance policy covering its property assets will be extended to include the Stadium at little or no cost. Scenario 1 allocates \$50,000 to facility insurance costs.

The cost of insurance should be reviewed in further detail as the business plan is advanced in Phase 2, based on the location, design, mix of uses and program for the facility as a public assembly space.

**Exhibit 43: Scenario 2 Base Case**

		Year 1	Year 2	Year 3	Year 4	Year 5
<i>Escalation (p.a.)</i>	3%	1.00	1.03	1.06	1.09	1.13
<b>Facility Expenses</b>						
Payroll (Labour)		(\$651,630)	(\$671,179)	(\$691,314)	(\$712,054)	(\$733,415)
Utilities		(\$334,625)	(\$344,664)	(\$355,004)	(\$365,654)	(\$376,623)
Operating, Maintenance and Repair (incl. purchased supplies)		(\$209,600)	(\$215,888)	(\$222,365)	(\$229,036)	(\$235,907)
Marketing		(\$20,000)	(\$20,600)	(\$21,218)	(\$21,855)	(\$22,510)
Insurance		\$0	\$0	\$0	\$0	\$0
Winterization of Stands and Set-Up/Take-Down of Bubble		(\$110,000)	(\$113,300)	(\$116,699)	(\$120,200)	(\$123,806)
Professional Development and Travel		(\$20,000)	(\$20,600)	(\$21,218)	(\$21,855)	(\$22,510)
Realty Taxes		\$0	\$0	\$0	\$0	\$0
<b>Total Expenses (Excl. Management Fee and Capital Reserve)</b>		<b>(\$1,345,855)</b>	<b>(\$1,386,231)</b>	<b>(\$1,427,818)</b>	<b>(\$1,470,652)</b>	<b>(\$1,514,772)</b>

**10.4.3 SUMMARY OF FINANCIAL PERFORMANCE****Exhibit 44: Scenario 2 Base Case**

		Year 1	Year 2	Year 3	Year 4	Year 5
<i>Escalation (p.a.)</i>	3%	1.00	1.03	1.06	1.09	1.13
<b>Net Income (NOI) Before Management Fee and Capital Reserve</b>		<b>\$184,340</b>	<b>\$182,888</b>	<b>\$181,392</b>	<b>\$179,851</b>	<b>\$178,264</b>
<b>Management Fee</b>		<b>(\$200,000)</b>	<b>(\$206,000)</b>	<b>(\$212,180)</b>	<b>(\$218,545)</b>	<b>(\$225,102)</b>
<b>Capital Reserve</b>		<b>(\$280,000)</b>	<b>(\$280,000)</b>	<b>(\$280,000)</b>	<b>(\$280,000)</b>	<b>(\$280,000)</b>
<b>NOI after Capital Reserve</b>		<b>(\$295,660)</b>	<b>(\$303,112)</b>	<b>(\$310,788)</b>	<b>(\$318,694)</b>	<b>(\$326,838)</b>

<b>PV of Operating Income: Discount Rate</b>		
<b>NOI before Fees and Capital Reserve</b>	<b>7%</b>	<b>\$2,288,583</b>
<b>NOI after Management Fee and Capital Reserve</b>	<b>7%</b>	<b>(\$3,344,074)</b>

The facility returns a marginal operating deficit after management fees, and a deficit of just under \$300,000 including capital reserve.

The achievement of this annual operating position is based on higher operating revenues from winter use of the facility (bubbled playing surface), as well as a moderate improvement in lease space revenue. Mitigating the full effect of these revenue gains is the outsourcing of risk associated with all event and facility concessions to a private operator. If this policy were pursued, the revenue gain to the facility is reduced and for illustrative purposes is shown as being 25% of net revenues. Specific agreements with a concession operator will determine the precise nature of the contractual relationship. It is also the case that the facility may choose to operate certain concessions (e.g. restaurant) and relinquish operations of others e.g. concession stands. As a result, the estimate of revenues from concessions in Scenario 2 may underestimate possible revenues to the facility.

In the absence of an anchor tenant around which a regular event schedule is possible, HRM should further consider the range of risks associated with the revenues attached to the facility (in Phase 2 based on alternate locations for the Stadium). Scenario 2 provides a “checks and balances” approach to these risks such that it is likely, in our opinion, that the facility is estimated to operate with a \$300,000 deficit (including capital reserve) if annual ticketed events are achieved as per the assumptions of this analysis. Based on our market research and preferred development concept, these assumptions are considered realistic.

## 10.5 RANGE OF DEFICIT

Before capital reserve, the deficit is between approximately \$200,000 and approximately a breakeven position. The range of deficit is estimated to be between \$475,000 and \$300,000 per annum with inclusion of capital reserve. For purposes of facility operations planning, Scenario 1 is recommended pending further assessment of location-specific revenue/cost matters in Phase 2.



## 11 RISK ANALYSIS

### 11.1 DEVELOPMENT, DESIGN AND CONSTRUCTION RISKS

A range of risks exist as described above, some of which are listed below. We recommend that HRM undertake a Value for Money (VFM) Analysis of the project once the design, site location, and construction cost are known. VFM is a risk assessment framework that can assist in determining the key variables which pose the greatest risk to the project and its achievement on time and on budget.

1. Macro Economic Conditions	7. Life Cycle and Residual Risks
2. National, Provincial and Local Policy	8. Operational
3. Government Funding	9. Revenue / Usage / Event Hosting and Success
4. Extraordinary Development Costs	10. Addition and Timing of Other Multi-Use Campus Functions
5. Design, Construction Cost & Timing	
6. Regulatory & Permitting	

All construction projects involve risk in their design, development and construction. These risks relate to a range of factors including the following principle elements:

- Insufficient detail in design leading to scope creep to meet anticipated functional requirements - there is significant risk in a project failing to meet its functional program requirements through insufficient definition of these functional requirements and their translation into program design and performance specifications. This translates into longer timeframes for completion and often increases in capital costs as well as insufficiencies in design and layout of buildings;
- Design errors and omissions – this is the risk associated with building features and requirements being either underrepresented or absent and necessitating attached design and construction solutions and potential cost additions in addition to usual project delays associated with such changes in scope. Additionally, there is an ultimate risk in any development project that the intended design is not fulfilled due the failure of the constructor to build the facility to design;
- Procurement risks – these risks pertain to problems which arise between prospective contractors and the procurement agencies (e.g. the Municipality). If drawings or other specifications are inadequate, this creates additional delays as constructors will require clarification and further specifications. This can result in an extended procurement process which may lead to delay in meeting the deadline in project completion as well as higher capital costs;
- Construction delays – from a variety of potential sources related to overall management, individual trades, materials or unforeseen site-related matters; and
- Cost overruns – for a variety of reasons, there is a risk associated with the capital cost as estimated in the design stage. The risk is that the total construction costs and the site development costs may exceed those estimates due to extraordinary costs which were unforeseen (this may include site related costs) as well as other factors which become known during site development and building construction process. Cost escalation as a result of higher cost of materials, labour costs due to inflationary pressures or shortage of trades are also factors which also affect cost increases.

## 11.2 OPERATING RISKS

Facilities, and in particular public sector municipal capital facilities and a number of operating risks related to revenue generation, operating costs reduction and expense management, effective programming and facility utilization, and attention to opportunities for marketing additional services and identification of revenue sources. Principle operating risks for this facility include:

- Revenue Risk - as in any exercise, the budgeting and estimating process with regard to operating performance should be developed as the design of the facility has further specified, as partners are made known, as more certainty exists regarding the range of operating costs closer to the time of the commissioning of the building. However, as the stadium operations are based on competitive bidding for major events, there is a higher level of risk associated with the operating returns. As discussed, significant discounts have therefore been applied to the event calendar as well as revenues generated by each event. We recommend that additional risk analysis be undertaken in Phase 2 to further define the quantitative scale of operating risk associated with event revenue;
- Operating costs risk – there is a risk that the operating cost would be higher than projected due the range of factors some of which can be estimated and some of which are difficult to estimate in advance. Items such as increased utility costs, unforeseen repairs and maintenance cost, higher management costs and a range of other factors which can affect the financial performance of large scale facilities. The operating model for the stadium links event revenues to operating event costs such that a reduction in event revenues will result in the reduction of event related operating costs; and
- Management performance – the management performance is a significant risk and can often be the difference between revenue growth and revenue attrition. The approach of the management team to operating the facility and all respects relating to marketing and services provided to both patrons and suppliers, and the overall environment in which the facility is marketed and positioned is of significance to the success of any facility.

The following sections outline the various risk and mitigation strategies that can be undertaken to reduce the range and scale of risks. In summary, these risk mitigation strategies pertain to both the mechanisms for delivery of capital asset as well as the ongoing operation. Some examples of general categories of risk mitigation include the following:

- Securing revenue sources through achieving anchor tenants, rental agreements with user groups and multi-year revenue agreements with regard to both participatory sports and acquisition of major events at the facility;
- High quality management of the facility – a key feature of risk mitigation which is based on utilization of industry expertise to maximise the revenue that the facility and ensure efficient operation and cost reduction in operating expenses;
- Minimize lifecycle costs through lifecycle cost planning – this can include the provision of capital reserve budget to meet facility cost in future years; and
- Pre-opening business planning – it is important that a detailed design and functional program is established for the facility, and potential programming and revenue opportunities is created for the operations of the facility, that a detailed plan of action is undertaken to create the necessary departmental operating cost budgets, marketing resource requirements, and preopening expenses to ensure that the facility operating plans and forecasts are as rigorous as possible and are aligned with the actual facility that has been designed and built.

## 12 ECONOMIC AND SOCIAL BENEFITS

A literature review on the economic impacts of multi-use sports/entertainment centres revealed a body of research on the non-economic benefits, such as social and development impacts – which could be significant. Among other positive social impacts such as an increase in reputation for a community, multi-use facilities also play an influential role in creating vibrant downtown areas that could help to attract the skilled workers a community requires to grow its economy. These facilities can also act as an anchor for downtown regeneration efforts, based on the ability to draw a critical mass of visitors to the area for events which can help support restaurants and retail shops in the district. Additionally, these large-scale projects can stimulate infrastructure investment in the district and attract other development projects.

The potential of multi-use centres and other public assembly spaces to spur adjacent development is the main focus of the research<sup>10</sup> on non-economic impacts, which examines the argument that these facilities act as catalysts for downtown revitalization and result in large tax windfalls for municipalities as commercial buildings in the vicinity increase in value and new revenue tax bases are created through residential development. The research is summarized further below and the conclusions from the research are as follows:

- In general, multi-use sports/entertainment centres can help spur development and significantly contribute to urban revitalization if part of a more comprehensive redevelopment master plan, but this is a long-term, sometimes decades-long, process;
- Other key factors – local business development, safety, transportation and connections between the multi-use centre and surrounding areas – also play a role in determining the degree of redevelopment success;
- The adjacent development impacts of a large public assembly space are not certain even in large centres with a significant regional population base; and
- In certain case studies, where municipalities or public undertook the redevelopment of surround lands to ensure development impacts were realized, significant assets were required in the context of the larger urban centres.

In a 2004 journal article<sup>11</sup>, Timothy Chapin assessed whether these multi-use sports centres have actually spurred redevelopment by using Baltimore and Cleveland as case studies:

- In Baltimore, Chapin concluded that while there was some localized redevelopment success in the immediate area of the two stadiums (Oriole Park and Ravens Stadium) in Camden Yards, it did not act as a catalyst to dramatically transform the western edge of the downtown as it was expected to do. However, since 2004, more development activity has occurred around Oriole Park.; and
- In Cleveland, Chapin found that the Gateway Sports Entertainment Complex was a successful catalyst spurring redevelopment projects – hotels, residential and retail – and acting as an anchor in the emerging entertainment district. However, there were also unintended consequences. In a spatial demonstration of the substitution effect, restaurants and shops from another district in the

<sup>10</sup> See Chapin, Timothy. (2004). "Sports Facilities as Urban Redevelopment Catalysts: Baltimore's Camden Yards and Cleveland's Gateway." *Journal of the American Planning Association*, 70(2); UC Davis MBA Consulting Center. (June, 2010). *Downtown Sacramento Entertainment and Sports Complex: A Catalyst for Economic Development?*; Rosentraub, Mark. (2008). *Sport Facilities, A New Arena in Edmonton, and the Opportunities for Development and a City's Image: Lessons from Successful Experiences*.

<sup>11</sup> Chapin, Timothy. (2004). "Sports Facilities as Urban Redevelopment Catalysts: Baltimore's Camden Yards and Cleveland's Gateway." *Journal of the American Planning Association*, 70(2).

city – called The Flats –were drawn into the Gateway area, resulting in diminished economic activity in The Flats.

Chapin’s research raised two questions: Why do some sports/entertainment facilities act as a catalyst for downtown revitalization in some downtowns but fail to stimulate redevelopment in others? What specific project attributes helped to create positive development benefits?

Building on Chapin’s work, a 2010 Sacramento report<sup>12</sup> argued that connections between sports/entertainment centres and the surrounding downtown areas were a key factor, in addition to other aspects such as local business development, safety and transportation. For example, in Baltimore, the two stadiums were disconnected from the rest of the downtown by large open parking lots. In Cleveland, successful redevelopment occurred but it came at the expense of an existing district. To mitigate potential economic displacement, municipalities should support not only the emerging district anchored by the new multi-use centre but also existing districts. Additionally, building connections between the centre and the surrounding areas is important for economic benefits to be realized and transportation and perceptions of safety are essential parts of that process.

In Indianapolis, a comprehensive redevelopment plan and on-going support of the area in terms of a sustained decades-long effort to invest in recreation, entertainment and supporting infrastructure such as hotels and conventions facilities, reaped benefits which maximized the impact of the development of the facility there (Hoosier Dome). The case of Indianapolis aligns well with Rosentraub’s 2008 report<sup>13</sup>, where he argued that the inclusion of these facilities within the framework of a comprehensive revitalization plan was important for successful revitalization to occur.

<sup>12</sup> UC Davis MBA Consulting Center. (June, 2010). *Downtown Sacramento Entertainment and Sports Complex: A Catalyst for Economic Development?*

<sup>13</sup> Rosentraub, Mark. (2008). *Sport Facilities, A New Arena in Edmonton, and the Opportunities for Development and a City’s Image: Lessons from Successful Experiences.*

**Exhibit 45: Case Study Summaries**

Case Study	Resulting Economic and Development Impacts
<p><b>Baltimore, Maryland</b></p> <p>Twin stadiums built in Camden Yards, a formerly derelict railyard and warehouse district. Oriole Park (48,876 seating capacity) was finished in 1992 and Ravens Stadium (68,915 seating capacity) in 1998.</p> <p><b>Context:</b></p> <p>Planners hoped that the stadiums would help revitalize the old retail district and the nearby poor neighbourhoods of Pigtown and Sharp-Leadenhall, and would stimulate new business activity, construction and increased employment opportunities for residents.</p>	 <p><b>Development and streetscape around Oriole Park</b></p> <p>The sports facilities helped to catalyze redevelopment and the reuse of a few buildings in the area and helped boost the tourist economy. In 2002, a \$30 million entertainment complex was developed along the eastern edge of the downtown along with new office developments. However, as of 2004, many properties still sit vacant, especially in Pigtown, and the area has not seen much residential growth (though that 2004 assessment may not be accurate today). Instead, the area has seen the development of parking lots.</p> <p>Lack of other development on the parking lots may also be attributable to resistance by the sports organizations to entertainment-oriented projects near their facilities.</p> <p>It is important to note that the assessment occurred in 2003-2004 and over the past 7 years, more development has occurred around the stadiums, especially around Oriole Park.</p>
<p><b>San Jose, California</b></p> <p>HP Pavilion opened in 1993 and is the home of NHL team San Jose Sharks and the SAP tennis Open.</p> <p>The seating capacity for the HP Pavilion ranges from over 11,000 for tennis, 17,483 seats for hockey, and over 19,000 for concerts. There are also 65 Executive Suites on 2 separate levels</p>	<p>After more than a decade in operation, the City of San Jose retained SportsEconomics to prepare an economic impact analysis of three 2007 events at HP Pavilion and Sharks Ice (the practice facility for the San Jose Sharks). The firm carried out surveys of attendees of the following events which were deemed representative of typical events at HP Pavilion and Sharks Ice:</p> <ol style="list-style-type: none"> <li>1. San Jose Sharks game, January 20, 2007</li> <li>2. CAHA Tier Hockey Weekend (Sharks Ice) February 9-11, 2007</li> <li>3. 2007 NCAA Men's Basketball Western Regional Tournament March 22 and 24, 2007</li> </ol>  <p>The surveys asked attendees about location of residence, reason for visit, dollars spent on activities in and outside the facility. Based on the survey results and other research data, the impacts of the three events were determined and from that estimated annual economic impacts were then derived for San Jose.</p>

	<p>The study only included spending that would not have occurred were it not for the event at the HP Pavilion, which is considered economic impact. So, attendees were grouped into 3 different categories and only spending by those attendees who live outside the city and who came into the city for the event. Further, attending the event does not replace a recent future or past visit to the city.</p> <p>The economic impact totals over \$190 million annually for both the HP Pavilion and Sharks Ice (not including inside facility spending but counting management spending). The tax impact of both facilities is over \$12.9 million, which includes the rent paid by SVSE (Silicon Valley Sports and Entertainment) to the City.</p> <p>The total direct spending annually by visitors to the HP Pavilion outside of the facility was about \$92 million, which then generated roughly \$150 million in total economic impact. The annual tax impact of the HP Pavilion, including spending inside of the facility, was about \$5.4 million. Further, the economic impact just from the 2007 regular season of the Sharks was over \$65 million not including spending inside the facility and over 2,400 full-time equivalent jobs were created.</p>
<p><b>Cleveland, Ohio</b></p> <p>Progressive Field (home to the MLB Cleveland Indians) and Quicken Loans Arena (home to NBA Cavaliers) opened in 1994 in a derelict area called the Gateway. Combined, the two centres are called the Gateway Sports and Entertainment Complex.</p> <p>Seating Capacity: Progressive field (<b>43,545</b>); Quicken Loans Arena (20,562)</p>	<p>Since 1994, the area has seen significant redevelopment including high-end housing conversion projects of vacant buildings. New major hotels such as the luxury Hyatt Regency at The Arcade have opened and over 800 housing units have been developed as of 2002 with another 800 in the planning stages. However, Chapin (2004) notes that the new housing and hotel development is not wholly the result of the sports/entertainment centres. There was latent demand for additional hotel rooms and substantial subsidies supported the rise of new housing in the downtown.</p>  <p>However, it is acknowledged that the centres did help to create a dynamic destination that succeeded in attracting new tourists and other local visitors. It also succeeded in attracting 16 new construction and adaptive reuse projects in the Gateway area from 1994-2001. Additionally, from 1993-2000, property values in the area increased by 13%. Despite these successes, some negative impacts resulted as some businesses (particularly restaurants) moved from other downtown districts to the vibrant new Gateway area.</p> <p>To create better connections between the sports/entertainment centres with other nearby activity centres, the City built pedestrian pathways to the Theatre district and a nearby mall.</p> <p><b>Sources:</b> UC Davis MBA Consulting Center. (June, 2010). <i>Downtown Sacramento Entertainment and Sports Complex: A Catalyst for Economic Development?</i></p> <p>Chapin, Timothy. (2004). "Sports Facilities as Urban Redevelopment Catalysts: Baltimore's Camden Yards and Cleveland's Gateway." <i>Journal of the American Planning Association</i>, 70(2).</p>



**London, Ontario**

Opened in 2002, John Labatt Centre (JLC) is a multi-purpose sports and entertainment facility - home to the London Knights. The JLC has a seating capacity of 9,090 for hockey and over 10,000 for concerts.

Public investment in John Labatt Centre was sizable as it was considered an integral part of its downtown revitalization strategy. The JLC is credited with playing a significant role in London's downtown regeneration.

In fact, from 2002 to 2009, the current value assessment in London's downtown core increased by 22%. Additionally, the 2009 State of the Downtown report states that the median value of building permits rose 176% from \$12,644 to \$35,000 from 2002 to 2008.

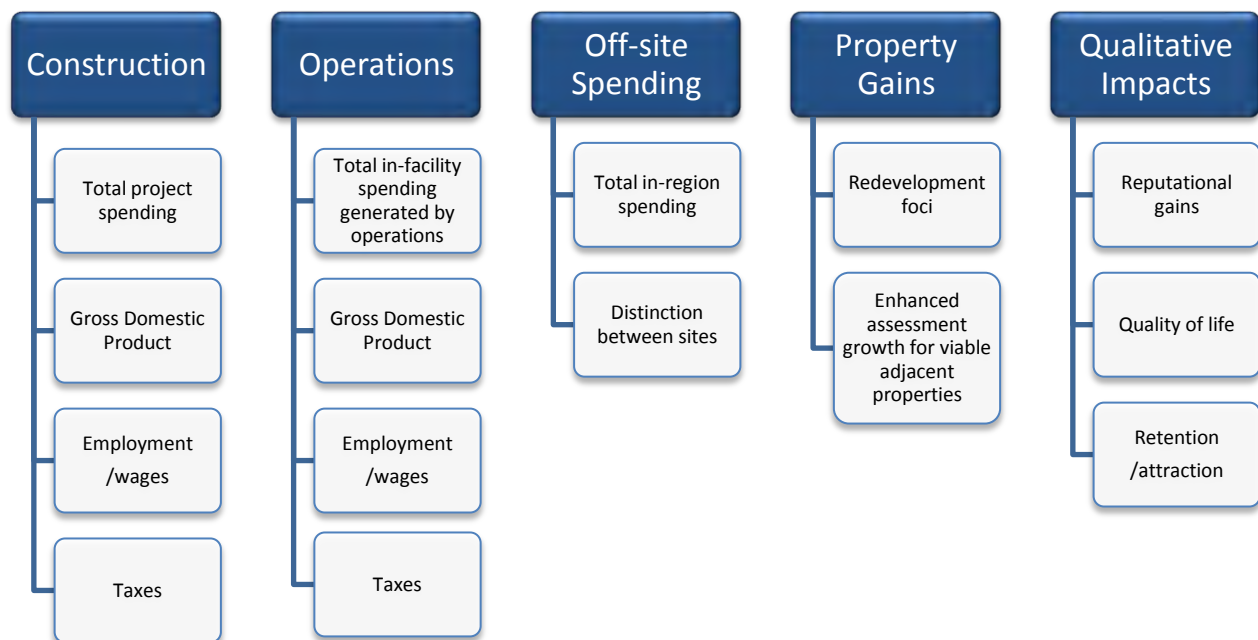
From 2001 to 2006, the downtown population increased by 22.5% and dwelling counts grew by 19%.



## 12.1 ILLUSTRATIVE ECONOMIC IMPACTS OF A POTENTIAL STADIUM IN HRM

The following economic impact analysis examines the scale of economic contribution of a potential stadium facility to the local, regional, provincial and national economies. The range of economic impact measures is extensive and the evaluation of several measures requires a determination of site location. The following exhibit illustrates the range of economic impact measures.

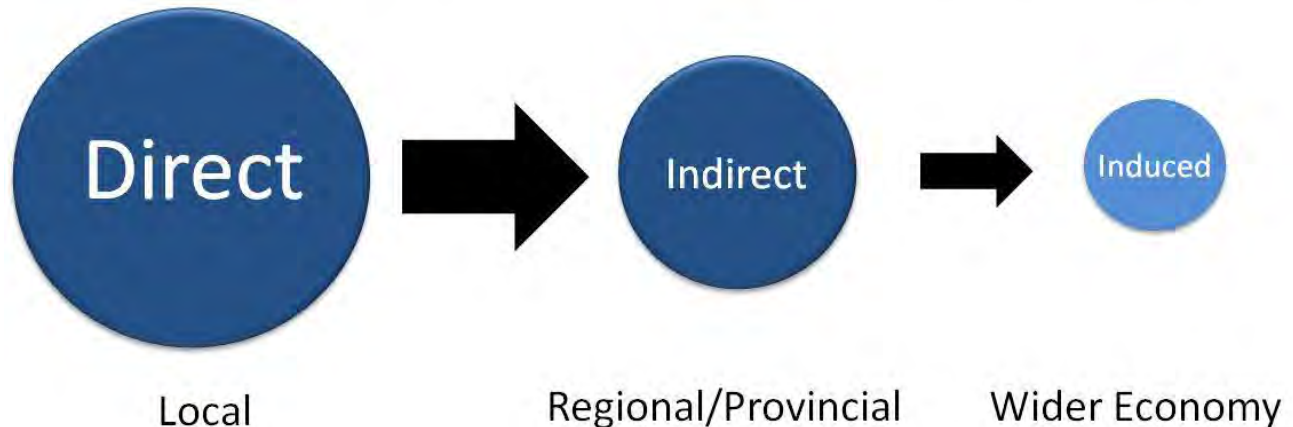
**Exhibit 46 Range of Economic Impact Measures**



Each measure of economic impact can be further distinguished as either a direct, indirect or induced impact. Direct impacts are one-time investments, spending or direct employment created by an investment such as the development of the facility. Indirect impacts are employment or spending impacts created in other industries in order to produce the materials (goods) and other inputs (services) necessary for the construction work or those necessary for the ongoing operations of the facility. Induced impacts

are employment or spending impacts created throughout the economy resulting from the expenditure of incomes generated through the direct and indirect impacts.

### Type of Impact and Principal Geographic Scale of Impact



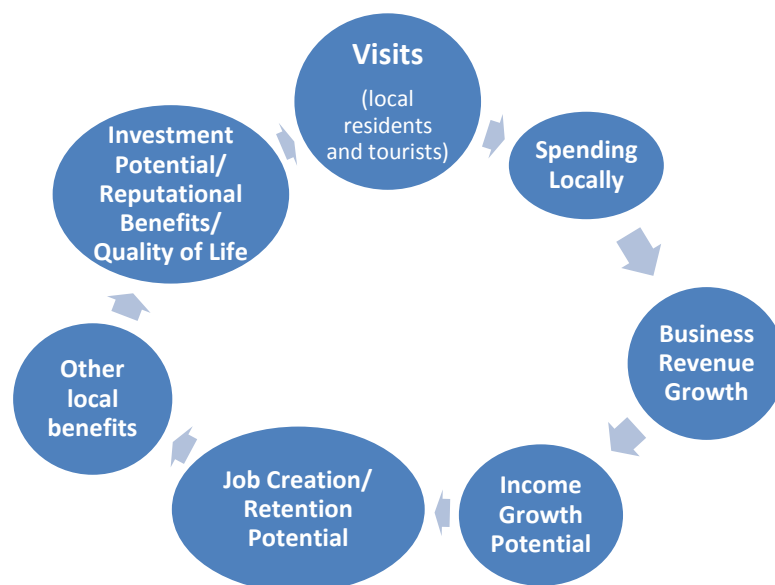
The following illustrative quantitative analysis of economic impact has been undertaken:

1. Estimating the economic impact of **construction** of the facility in terms of a range of measures: Gross Domestic Product (GDP), capital spending, income, employment, as well as income taxes generated provincially and nationally; and
2. The impacts of **spending** at the stadium – this represents a direct impact on an ongoing basis and is therefore an estimate of economic impact in its own right.

The analysis focuses on those impacts which are net additional to the regional economy, as well as the provincial economy. The analysis also identifies and places in context the range of benefits which defy accurate measurement at one point in time, but which are constants which should be borne in mind – the qualitative benefits of investment to the broader community and the quality of life equation in the Region.



### Exhibit 47 How Facility Operations Create Impact



The results of this analysis should be treated as a guideline to economic impact of the Halifax Stadium based on the range of assumptions regarding its design, scale, operations and location. Should any of the key assumptions which underlie the analysis change – such as the capital costs of the facility or its seating capacity, the economic impacts can be expected to vary. Importantly, the analysis of impact assumes that the macro-economic environment remains stable and that normal business cycles are assumed to occur.

## 12.2 ECONOMIC IMPACTS OF STADIUM CONSTRUCTION

For purposes of illustrating the potential economic impacts from capital construction of a potential stadium facility in HRM, a capital cost range based on an understanding of a number of actual stadium capital cost examples from North American facilities is used.

### Gross Domestic Product (GDP) Impacts from Construction Activity

Gross Domestic Product (GDP) is an alternative measure of impact and conceptually equates to measures of economic production (output), income (employment income plus profit for owners and corporations) and spending<sup>14</sup>. The following estimates of GDP as a measure of impact of the construction of the facility include direct impacts, in province impacts and national indirect impacts.

GDP from Construction Activity		
	Lower Range	Upper Range
Direct	\$22m	\$27m
Direct & Indirect (In Province)	\$30m	\$36m
<b>Direct &amp; Indirect (All Provinces)</b>	<b>\$40m</b>	<b>\$48m</b>

<sup>14</sup> The production approach to measuring GDP estimates the value of an output (goods or services) less the value of inputs used in the output's production process; The income approach to measuring GDP estimates the wages (individuals) and profits (owners and corporations) arising from the production of good and services; and, the spending approach to measuring GDP estimates total expenditure on finished or final goods and services produced in the domestic economy.

GDP from Construction Activity		
Indirect (In-Province)	\$8m	\$9m
Indirect (All Other Provinces)	\$10m	\$12m

Total direct and indirect GDP Impacts from construction activity to all provinces range from \$40m - \$48m. The figures include GDP impacts from both construction related costs as well as consulting related or soft costs.

### Construction Related Employment Impacts

The employment totals shown below represent person years of employment. Person years of employment are full time equivalent (FTE) jobs for a period of one year. The employment generated during the design and construction phase of the project is not enduring employment – it represents a one-time impact arising from the capital expenditures on development. Irrespective, the combined effect of the design and construction is highly significant – ranging from 487-584 person years of employment.

Person Years of Employment from Project Development			
	Total In-Province Employment	Total Out-of-Province Employment	Total Employment
<b>Lower Range</b>	395	92	487
<b>Upper Range</b>	474	110	584

While these jobs are not retained permanently and a portion may be outsourced to non-local workers, their impact is significant in the short term and may have positive impacts on longer term sustainability of local businesses and employment in the Region.

### Federal and Provincial Income Tax Impacts

Estimates of income tax generated by the employment in the design and construction of the potential new stadium facility are based on marginal tax rates in effect for 2011, and the latest available rates for non-refundable tax credits in Nova Scotia.

The analysis includes the estimate of Provincial versus Federal taxes generated and applied to the estimated average income of each FTE position generated by the project. Average income estimates are based on Statistics Canada's Employment, Earnings and Hours report (October, 2010).

Income Tax Impacts of Project Development				
	Person Years of Employment	Estimated Federal Tax	Estimated Provincial Tax	Estimated Total Taxes
<b>Lower Range</b>	487	\$1.8m	\$1.6m	\$3.4m
<b>Upper Range</b>	584	\$2.1m	\$1.9m	\$4.0m

The range of total income tax impacts from facility design and construction is estimated to be in the range of \$3.4m - \$4.0m.

## 12.3 OFF-SITE EVENT SPENDING RELATED IMPACTS

### Annual Event Spending Impacts

The following analysis provides an estimate of the total off-site spending expected to be generated by events hosted at the new facility. It is important to note that the economic impacts related to visitor spending are not simply limited to the Halifax Region, but will be experienced in other parts of the Province as well.

As a number of the anticipated events to be held at the stadium facility are as much participant based as spectator based, the analysis of off-site event related spending has been divided to show the spending related impacts of both spectators and participants. Included in the category of participants are the support staff (coaches, medical, etc.) to each team.

The analysis makes key assumptions with regard to the different per capita spending estimates between residents/same day spectators and participants and visitor/overnight spectators and participants. As well, the proportion of patrons and participants categorized as same day versus overnight differ by scale of event.

#### Key assumptions with regard to event spectators:

- A range of 60,000 – 90,000 spectators are expected annually;
- 40% of annual spectatorship will be attributed to regular events, while 60% of spectatorship will be attributed to special events (national and international events);
- Regular event spectators will comprise 95% same day trips and 5% overnight trips; and
- Special event spectators will comprise 50% same day trips and 50% overnight trips.

#### Key assumptions with regard to event participants:

- A range of 4,000 – 6,000 participants are expected annually;
- 80% of annual participants will be attributed to regular events, while 20% of participants will be attributed to special events (national and international events);
- Regular event participants will comprise 80% same day trips and 20% overnight trips; and
- Special event participants will comprise 10% same day trips and 90% overnight trips.

The regional off-site spending estimates are presented below under both a moderate attendance scenario and a lower attendance scenario.

**Summary: Lower Attendance Scenario**

<b>Expenditure by All Patrons All Events</b>	<b>Total Annual Expenditure by Category</b>			<b>Total Annual Expenditure</b>
	<b>Food &amp; Beverage</b>	<b>Retail</b>	<b>Accom.</b>	
Spectator Regular Events	\$237,600	\$124,200	\$60,000	\$421,800
Spectator Nat./Int. Events	\$648,000	\$648,000	\$1,620,000	\$2,916,000
Participant Regular Events	\$40,320	\$34,560	\$57,600	\$132,480
Participant Nat./Int. Events	\$20,160	\$14,400	\$64,800	\$99,360
<b>Total Annual Expenditure</b>	<b>\$946,080</b>	<b>\$821,160</b>	<b>\$1,802,400</b>	<b>\$3,569,640</b>

**Summary: Moderate Attendance Scenario**

<b>Expenditure by All Patrons All Events</b>	<b>Total Annual Expenditure by Category</b>			<b>Total Annual Expenditure</b>
	<b>Food &amp; Beverage</b>	<b>Retail</b>	<b>Accom.</b>	
Spectator Regular Events	\$356,400	\$186,300	\$90,000	\$632,700
Spectator Nat./Int. Events	\$972,000	\$972,000	\$2,430,000	\$4,374,000
Participant Regular Events	\$60,480	\$51,840	\$86,400	\$198,720
Participant Nat./Int. Events	\$21,600	\$21,600	\$97,200	\$140,400
<b>Total Annual Expenditure</b>	<b>\$1,410,480</b>	<b>\$1,231,740</b>	<b>\$2,703,600</b>	<b>\$5,345,820</b>

**Sales Tax Impacts**

Given the provincial sales tax rate of 15% in the Province of Nova Scotia, the total estimated sales tax impact arising from off-site events spending attributable to stadium events is in the range of \$535,000 - \$800,000 annually.

# Appendix A

---

**Summary of Consultation Program  
and Community Engagement**

---

This page intentionally left blank

## COMMUNITY ENGAGEMENT AND CONSULTATION

---

The community and stakeholder consultation and engagement program related to the Phase 1 stadium analysis is an important component of the exercise. Several means of public engagement were employed as part of the analysis:

1. Key Informant Interviews
2. Key Informant Group Meetings
3. Survey of Provincial Sporting Organizations
4. Public Open House Meetings
5. Social Media Engagement (Facebook and Twitter)

The methodology and participation under each are detailed under the following sections, while findings are reported at the conclusion of this section by theme.

### KEY INFORMANT INTERVIEWS

Throughout the process, a number of key groups and key stakeholders were consulted. The purpose for consultation with each group or individual differs, however, the general intent of establishing and understanding the feasibility of a potential stadium facility in HRM remained the primary focus of each meeting. The following table summarizes the groups and individuals who were consulted during the Phase 1 process and the method by which they were contacted.

Group/Organization Represented	Individual Meeting	Telephone interview
St. Mary's University (Colin Dodds)	x	
Dalhousie University	x	
Department of National Defence	x	
HRM Mayor and Deputy CAO	x	
World Trade Centre (Scott Ferguson)	x	
School Athletics Federation (Darrell Dempster)	x	
Canadian Football League	x	
BMO Field Facility Tour	x	
King George V Facility Tour	x	
Varsity Stadium Facility Tour	x	
Athletics Nova Scotia		X
Atlantic University Sports		X
Events Nova Scotia (Grant MacDonald)		X
Major League Soccer		X
Atlantic Lottery Corporation (Chuck Bridges)		X
Lansdowne Park Administration		X
Greater Halifax Partnership (Paul Kent)		X
<b>Total Key Informant Interviews</b>		<b>17</b>



## KEY INFORMANT GROUP MEETINGS

During the month of May and June, 2011, members of the consulting team led a number of key informant group meetings in the Halifax Regional Municipality. Informants were grouped in by interest to the project or affiliation, and participants were encouraged to discuss issues amongst group members and provide feedback to the consultant on behalf of the groups and organizations which they each represent. The objectives of the key informant group meetings were to:

1. Provide background Information to the participants regarding the Phase 1 Halifax Stadium Business Plan;
2. Understand Economic and Business Development goals of the business community in HRM and the opportunities to further these goals arising from the potential development of a stadium;
3. Understand the stadium in its context – the competing priorities of stakeholders for public and private investment in HRM;
4. Discuss the scale of facility options in terms of land requirements, transportation and access needs as well as ancillary development opportunities; and
5. Understand future recreation planning needs and implications for potential locational criteria.

Over 30 individuals participated as part of the key informant group meetings. In consideration of the privacy of participants, the following list shows only the group names and a brief description of each group consulted.

- **Events**, members of the concert, event and tourism sector in the HRM
- **Developers**, private commercial, retail and residential developers and property owners in the HRM
- **Business Development**, members of the business community and business associations
- **Regional Councillors**, Members of HRM Regional Council
- **Interested Citizens**, HRM citizens who have expressed an interest in the stadium analysis process
- **Land Acquisitions**, HRM staff involved in planning, infrastructure, facilities and land acquisitions

## SURVEY OF PROVINCIAL SPORTING ORGANIZATIONS

A major component in determination of the feasibility of a potential stadium in HRM relates to the day-to-day programming of the facility by local and regional sporting groups and associations. In that regard, the consulting team developed, as part of the Phase 1 research, a questionnaire soliciting input on the potential usage of the facility by various sporting organizations operating in HRM.

The survey was designed to gain an understanding of the viability of long term fiscal success of the facility, opportunities for major event hosting, sport tourism opportunities and daily benefits to citizens for sport, recreation and leisure access. Provincial sporting associations with relevant potential programming needs were approached to complete the survey. The survey asked the following of provincial sporting organizations:

1. What facilities do you currently use to fulfill your programming needs?
2. How many hours each week do you use the facilities mention in #1?
3. What are your current rental rates/agreements with facility owners/HRM etc.?
4. If applicable, please provide details of membership revenues.
5. Do you consider the current access to fields and fees that you pay to be a reasonable value for money? If not, please explain further.
6. Would your group/organization be interested in contributing to programming in the Stadium after the FIFA 2015 Women's World Cup event? If yes, explain why.
7. What are your specific needs for programming which, in your view, could be provided by a Stadium?
8. How many hours per week would you be able / willing to use the Stadium? For what activities? (list all program activities)
9. What types of physical facilities / facility features do you require? (Please list specifically and indicate whether mandatory or non-mandatory but desirable)
10. If a new spectator stadium were built which accommodated your needs, would you be willing to pay higher fees for access to better amenities? Please explain your tolerance to increased rental fees associated with this facility.
11. How much would you be willing to pay (per hour) for use of the Stadium?
12. How much would your group/organization be willing to contribute to the capital cost of the Stadium (if at all)? Are you able to contribute to fundraising efforts? Please explain your answer.
13. Do you have any other thoughts or comments to share regarding development / planning of the Stadium?

As at the time of writing of this report (July, 2011) the consulting team received a total of 7 surveys. Specifically, surveys were received from the following organizations:

- Baseball Nova Scotia
- Field Hockey Nova Scotia
- Football Nova Scotia
- Golf Nova Scotia
- Soccer Nova Scotia
- Lacrosse Nova Scotia Society
- Athletics Nova Scotia

In order to preserve the privacy and confidentiality of survey respondents, the following represents a summary of important messages and themes derived from the survey responses.

- Rental rates for existing facilities ranged in price between \$20-\$125 per hour
- Membership in most sporting groups is experiencing an increase, and the need for new facilities is becoming more prominent.
- Almost all groups expressed an interest in programming in the stadium after the 2015 Women's World Cup event.
- Programming from each group is dependent on cost and location. There appears to be a hesitation to commit to programming at a new facility.
- Most groups understand that a new facility might command an increase in fees and were willing to consider an increase in fees phased in over time.

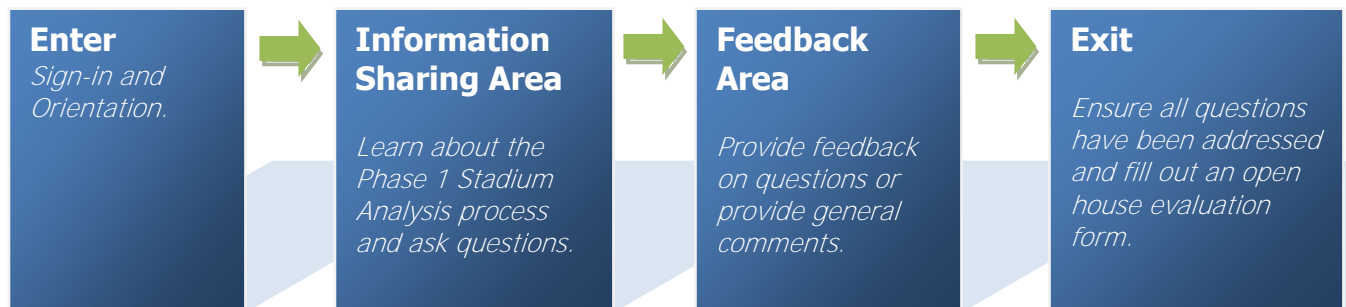
- Most groups expressed an interest in contributing to capital fundraising efforts, but none of the groups are able to make a financial contribution towards the capital cost.

## PUBLIC OPEN HOUSE MEETINGS

A total of 3 public open house meetings were held throughout the Halifax Region. The following table summarizes the date, location and number of participants in each of the three open house meetings:

Open House Date	Open House Location	Number of Participants
Monday June 6, 2011	Maritime Hall at the Halifax Forum, Halifax	55
Wednesday June 8, 2011	Cole Harbour Place, Cole Harbour	24
Thursday June 9, 2011	LeBrun Recreation Centre, Bedford	14
<b>Total Public Participants</b>		<b>93</b>

Open house meetings were each arranged into four different areas where participants are invited to flow freely from various areas, but encouraged to participate in each of the areas in a linear manner. The four areas and their purpose are described in the exhibit below.



A full summary and transcription of feedback received from the public open house meeting are available as part of a standalone document titled “Phase 1 Stadium Analysis: Public Open House Summary”. A total of 5 questions were posed for feedback from open house participants. The following describes the questions, their rationale and the top responses by theme.

### Question: How would you describe an ideal stadium facility?

Rationale: Phase 1 of the stadium analysis does not touch specifically on design aspects of the facility, however, it is important to understand the various facility components which are envisaged or the uses which may be accommodated in the facility. For this reason, we have asked the public to describe their perception of an ideal stadium facility.

### Question: How might you see the facility being used beyond the FIFA event?

Rationale: An important component in the development of the business case for the stadium facility is the legacy potential of the stadium and its viability after hosting of the 2015 FIFA Women’s World Cup event. The stadium business case assumes that an anchor tenant would not occupy the facility

immediately following the FIFA event, rather, community-level usage and local, regional and national events and competitions would anchor the facility.

Question: Will a new stadium impact your quality of life?

Rationale: The perception of how a potential stadium may change the quality of life of individuals, whether negatively or positively is an important measure of public sentiment towards the project. The question also provides an opportunity for the public to reflect on how a stadium may impact their lives individually.

Question: Will a new stadium impact the quality of life of the Region?

Rationale: The perception of how a potential stadium may change the quality of life of the region, whether negatively or positively is an important measure of public sentiment towards the project. The question also provides an opportunity for individuals to consider regional impacts of a potential new stadium.

Question: How could a new stadium be accessible to the public?

Rationale: It is envisaged that community-level usage and local and regional events and competitions would anchor the facility immediately following the 2015 FIFA Women's World Cup event. Opinion and ideas on how to create an accessible environment for the general public are important to understand from potential users, participants and spectators to the facility.

## **SOCIAL MEDIA ENGAGEMENT**

The social media component of the community engagement strategy was and continues to be used as an important means to communicate and hear from the public using the world wide web. Two social media webpages have been established to communicate with the public throughout the stadium analysis process:

1. A project **Facebook** page located at [www.facebook.com/halifaxstadium](http://www.facebook.com/halifaxstadium)
2. A project **Twitter** feed located at [www.twitter.com/halifaxstadium](http://www.twitter.com/halifaxstadium)

The social media webpages serve to:

- Communicate timely information regarding the project and the process with the public;
- Advertise formal feedback opportunities such as open house meetings and an email address established for receiving comments;
- Receive feedback from the public in response to questions posed by the consulting team (note that questions posed via social media are the same as those posed at the open house meetings); and
- Receive any comments or general feedback from the public.

As at the time of writing of this report, the Halifax Stadium Facebook Page had a total of 160 monthly active users and the Halifax Stadium Twitter Page had a total of 103 followers. It is expected that the online following of the stadium analysis project will grow as the project progresses is movement to Phase 2 is approved by Halifax Regional Council.

## CONSULTATION FINDINGS BY THEME

The insights, findings and information gathered from the consultation and engagement process have been considered and incorporated throughout the Phase 1 Stadium Analysis business planning and feasibility assessment exercise. The following summarizes the prominent themes following consultation with various key informants, stakeholders and the public in general:

- **Value for money** – the need for a fiscally prudent analysis leading to efficient development and operation of a facility which would respect the competing needs and wants of taxpayers.
- **Mixed use** – the need for a business plan which speaks to a facility which maximizes the utility for the largest segment of the population as possible through accommodation of multiple uses.
- **Expandability** – design a facility which grows with the HRM and will be able to accommodate the needs of tomorrow. This may mean the functional capacity to expand seating to accommodate a professional sporting franchise in the future.
- **Quality of Life and Reputational Benefits** – the need for HRM to grow into the reputation of being a major centre and “hub City” in Atlantic Canada.
- **Economic Benefits** – the need to stimulate economic development in certain areas of the Region and capitalize on the unmet demand for City and Region-wide events and tournaments.
- **Community Accessibility** – the need to accommodate user groups of varying age, skill level, gender, ethnicity and abilities.
- **Green building technologies** – the desire to incorporate principles of sustainability in the construction and operation of any municipal facility.

Note that a full transcription of feedback received during three public open house meetings is available under as a separate document titled *“Phase 1 Stadium Analysis: Public Open House Summary”*.

# Appendix B

---

**Socioeconomic Analysis of the HRM  
Population**

---

This page intentionally left blank

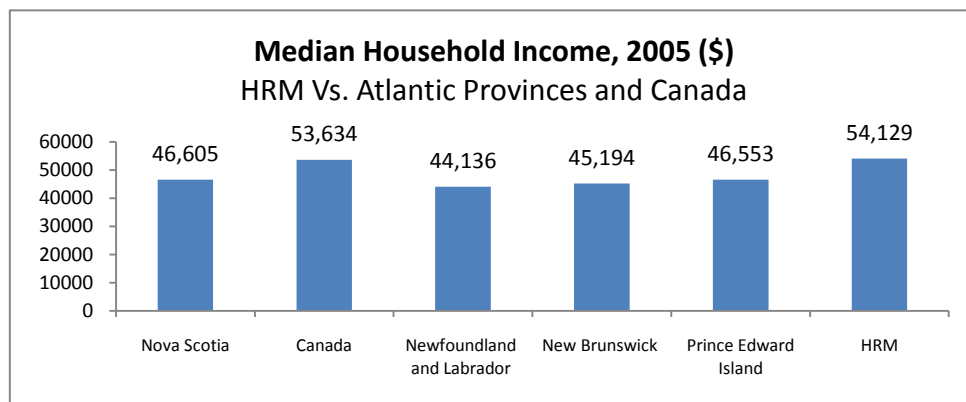


## SOCIO ECONOMIC ANALYSIS OF THE HRM POPULATION

---

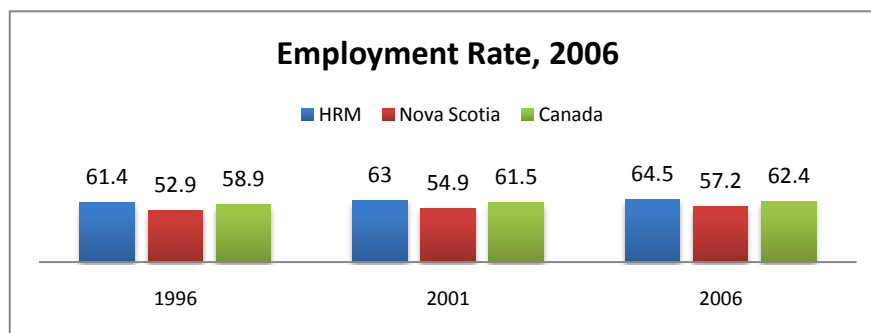
The following socio-economic analysis uses data from the 2006 Statistics Canada Community Profile and 2007 Statistics Canada census trends for Halifax.

The median household income in HRM has steadily increased from 1996 to 2006 – from \$50,363 to \$54,129. In that same period, the median household income has remained higher than the provincial figure. The median household income in HRM is highest compared to the rest of the Atlantic Provinces and Canada as a whole.



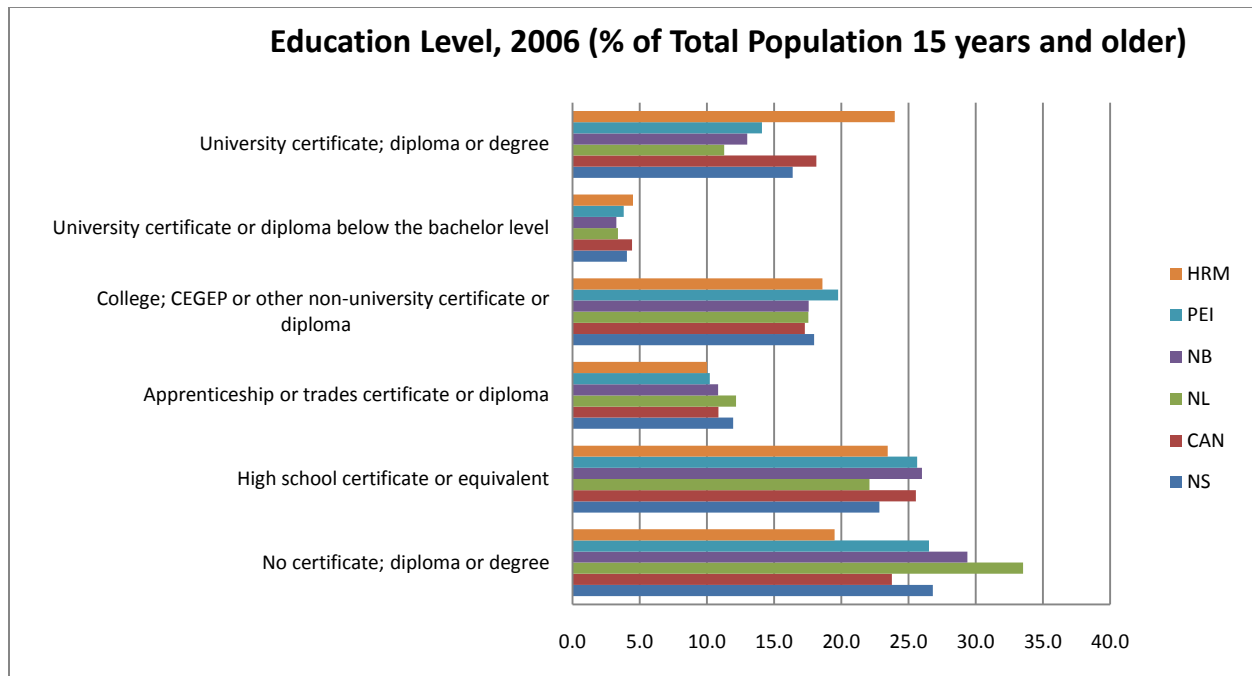
Source: Statistics Canada. 2006 Community Profiles.

The employment rate in Halifax has also increased from 1996 to 2006 – from 61.4% to 64.5%. This rate was higher than the provincial and national equivalents from 1996 to 2006.



Source: Statistics Canada. 2007. Census trends for Halifax (table). 2006 Census.

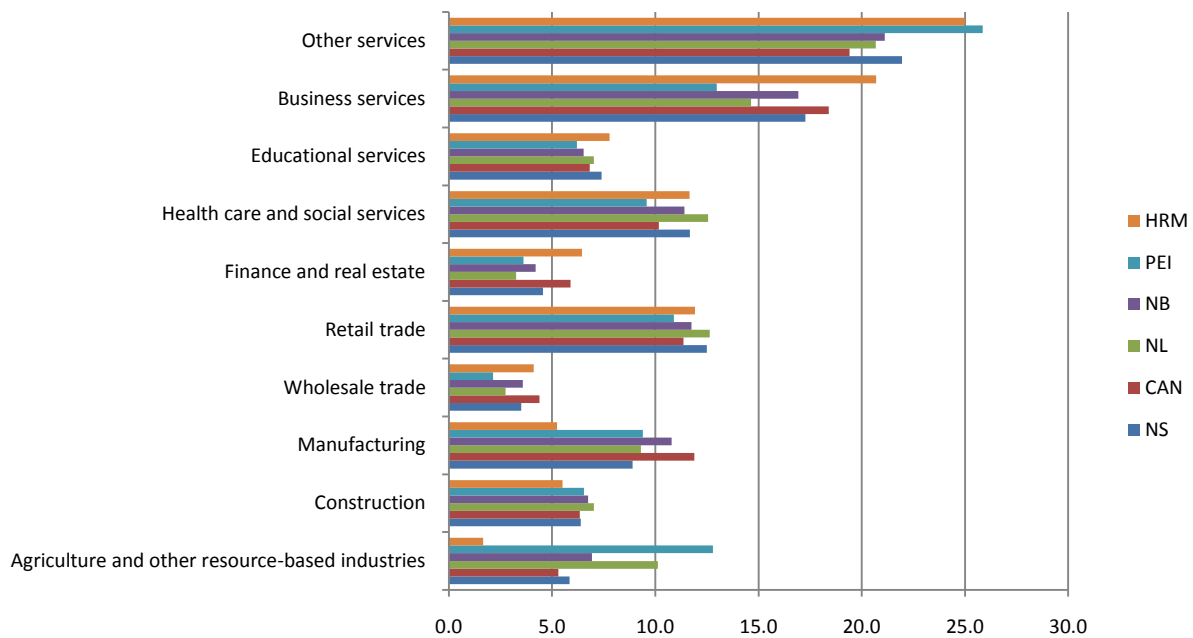
Residents in Halifax Regional Municipality have a higher level of education when compared provincially, regionally and nationally. A larger percentage of HRM (24%) residents have a university certificate, diploma or degree in relation to those in the province, Atlantic Canada and Canada as a whole, as shown in the following exhibit. Additionally, 19.5% of the adult population (15 years and older) in HRM have no certificate or diploma, which is lower than the provincial number of 26.8% and the national percentage of 23.8.



Source: Statistics Canada. 2006 Community Profiles.

The following exhibit shows the distribution of the labour force in Halifax by industry by percentage of total labour force (15 years and older) as compared to the provincial, national and regional breakdown of labour force. A larger percentage of the labour force in HRM works in Business Services when compared to the labour force in Canada, Nova Scotia and the Atlantic provinces. There is also a smaller percentage of the labour force in the Agriculture and resource-based industries in Halifax than in Canada, the Atlantic provinces, and Nova Scotia as a whole.

## Labour Force by Industry (%), 2006



Source: Statistics Canada. 2006 Community Profiles.

According to the 2009 Altus Group report on employment, population and housing projections, employment growth in HRM from 2004 to 2008 was slightly higher than the provincial average – the average annual growth in HRM was 0.9%, which was 0.3 percentage points higher than the provincial average. In terms of projected employment, 37,000 jobs are expected to be created during the period between 2006 to 2026.

### Immigration

Halifax is a major immigrant reception area in the Atlantic provinces, as it is home to the largest foreign-born population in the region<sup>1</sup>. Additionally, over 60% of the foreign-born population in Nova Scotia live in the HRM. From 2001 to 2006, more than 73% of the Province's recent immigrants chose HRM as their destination of choice.

### HRM Percentage of Immigration to Nova Scotia

	HRM	Nova Scotia	HRM - % of Immigrants to NS
Immigrants	27,405	45,195	60.6
Before 1991	16,585	30,305	54.7
1991 to 2000	5,760	7,985	72.1
2001 to 2006	5,060	6,900	73.3
Non-permanent residents	2,205	3,405	64.8

<sup>1</sup> Immigration in Canada: A portrait of the foreign-born population, 2006 Census. 2008. Statistics Canada

---

This page intentionally left blank

# Appendix C

---

**Annual Available Events 2015-2025**

---

This page intentionally left blank

# **Illustrative List of Potential Stadium Events 2015-2025**

## **Soccer**

### **2015**

CSA Challenge Trophy  
 CSA Jubilee Trophy  
 CSA National Team Event  
 Sony U-18 Cup  
 CSA East Masters Competition  
 CSA East Classics Competition  
 CSA U-14 Cup  
 CSA U-16 Cup  
 Atlantic U-13 Championships  
 Atlantic U-14 Championships  
 Atlantic U-15 Championships  
 Atlantic U-16 Championships  
 Tier 1 U-14 Provincial Championships  
 Tier 1 U-16 Provincial Championships  
 Tier 1 U-18 Provincial Championships  
 CIS Men's Soccer Championships  
 CIS Women's Soccer Championships  
 World Military Women's Championship  
 CONCACAF Champions League  
 Nutrilite All Stars  
 ACAA Men's Championships  
 ACAA Women's Championships  
 NSSAF Junior Varsity Soccer Championships  
 NSSAF Division 1 Boys Championship  
 NSSAF Division 1 Girls Championship  
 NSSAF Division 2 Boys Championship  
 NSSAF Division 2 Girls Championship  
 NSSAF Division 3 Boys Championship  
 NSSAF Division 3 Girls Championship  
 NSSAF Division 4 Boys Championship  
 NSSAF Division 4 Girls Championship  
 NSSAF Division 5 Boys Championship  
 NSSAF Division 5 Girls Championship  
 Soccer NS Provincials  
 CCAA Soccer National Championship - Men's  
 CCAA Soccer National Championship - Women's  
 Military World Cup - Mens  
 Military World Cup - Womens  
 FIFA Women's World Cup  
 FIFA U-20 World Cup  
 FIFA U-17 World Cup  
 CONCACAF Gold Cup  
 CONCACAF U-20 Championship  
 CONCACAF U-17 Championship

### **2016**

CSA Challenge Trophy  
 CSA Jubilee Trophy  
 CSA National Team Event  
 Sony U-18 Cup  
 CSA East Masters Competition  
 CSA East Classics Competition  
 CSA U-14 Cup  
 CSA U-16 Cup  
 Atlantic U-13 Championships  
 Atlantic U-14 Championships  
 Atlantic U-15 Championships  
 Atlantic U-16 Championships  
 Tier 1 U-14 Provincial Championships  
 Tier 1 U-16 Provincial Championships  
 Tier 1 U-18 Provincial Championships  
 CIS Men's Soccer Championships  
 CIS Women's Soccer Championships  
 World Military Women's Championship  
 CONCACAF Champions League  
 Nutrilite All Stars  
 ACAA Men's Championships  
 ACAA Women's Championships  
 NSSAF Junior Varsity Soccer Championships  
 NSSAF Division 1 Boys Championship  
 NSSAF Division 1 Girls Championship  
 NSSAF Division 2 Boys Championship  
 NSSAF Division 2 Girls Championship  
 NSSAF Division 3 Boys Championship  
 NSSAF Division 3 Girls Championship  
 NSSAF Division 4 Boys Championship  
 NSSAF Division 4 Girls Championship  
 NSSAF Division 5 Girls Championship  
 NSSAF Division 5 Girls Championship  
 Soccer NS Provincials  
 CCAA Soccer National Championship - Men's  
 CCAA Soccer National Championship - Women's  
 Military World Cup - Mens  
 Military World Cup - Womens  
 FIFA U-20 Women's World Cup  
 FIFA U-17 Women's World Cup  
 CONCACAF Women's Gold Cup  
 CONCACAF Men's Pre-Olympic Tournament  
 CONCACAF Women's Pre-Olympic Tournament  
 CONCACAF Women's U-20 Championship  
 CONCACAF Women's U-17 Championship

# Illustrative List of Potential Stadium Events 2015-2025

	2015	2016
<b>Football</b>	Grey Cup Vanier Cup The Canadian Bowl Football Canada Cup Flag Football National Championships U-16 Male Flag Football National Championships U-16 Female Flag Football National Championships U-18 Male Flag Football National Championships U-18 Female National Flag Football Championships U-15 Co-ed NSSAF Football Championships AUS Men's Football Championships AUS Women's Football Championships Loney Bowl	Grey Cup Vanier Cup The Canadian Bowl Football Canada Cup Flag Football National Championships U-16 Male Flag Football National Championships U-16 Female Flag Football National Championships U-18 Male Flag Football National Championships U-18 Female National Flag Football Championships U-15 Co-ed NSSAF Football Championships AUS Men's Football Championships AUS Women's Football Championships Loney Bowl
<b>Rugby</b>	NSSAF Rugby Championships ACAA Women's Rugby Championships ACAA Men's Rugby Championships AUS Women's Rugby Championships CIS Women's Rugby	NSSAF Rugby Championships ACAA Women's Rugby Championships ACAA Men's Rugby Championships AUS Women's Rugby Championships CIS Women's Rugby
<b>Lacrosse</b>		<b>World Lacrosse Championship (mens)</b>
<b>Field Hockey</b>	CIS Women's Field Hockey Championships Field Hockey Canada Superleague Field Hockey Canada National Championships Field Hockey Canada Under 16 Championships	CIS Women's Field Hockey Championships Field Hockey Canada Superleague Field Hockey Canada National Championships Field Hockey Canada Under 16 Championships
<b>Athletics</b>	Atlantic University Sport Championship - Men's Atlantic University Sport Championship - Women's CIS Championship - Men's CIS Championship - Women's NSSAF Provincial Championships Hershey Provincial Final Atlantic Hershey Championships Atlantic Track and Field Championships Canadian Masters Track & Field Championships The Legion Canadian Youth Track & Field Championships Canadian Junior Track & Field Championships Canadian Senior Track & Field Championships Aileen Meagher International Track Classic Canadian Track & Field Championships IAAF World Challenge IAAF Diamond League (International) NSSAF Track and Field District Meets and Regional Meets IAAF World Youth Championships in Athletics IAAF World Championships in Athletics Pan American Junior Athletic Championships	Atlantic University Sport Championship - Men's Atlantic University Sport Championship - Women's CIS Championship - Men's CIS Championship - Women's NSSAF Provincial Championships Hershey Provincial Final Atlantic Hershey Championships Atlantic Track and Field Championships Canadian Masters Track & Field Championships The Legion Canadian Youth Track & Field Championships Canadian Junior Track & Field Championships Canadian Senior Track & Field Championships Aileen Meagher International Track Classic Canadian Track & Field Championships IAAF World Challenge IAAF Diamond League (International) NSSAF Track and Field District Meets and Regional Meets IAAF World Junior Track and Field Trials IAAF World Junior Championships in Athletics Canadian Olympic Trials Canadian Paralympic Trials
<b>Other</b>	NSSAF Cheerleading Championships Dalhousie University Convocation Ceremony St. Mary's University Convocation Ceremony International Children's Games	NSSAF Cheerleading Championships Dalhousie University Convocation Ceremony St. Mary's University Convocation Ceremony International Children's Games



## Illustrative List of Potential Stadium Events 2015-2025

	2017	2018
Soccer	CSA Challenge Trophy	CSA Challenge Trophy
	CSA Jubilee Trophy	CSA Jubilee Trophy
	CSA National Team Event	CSA National Team Event
	Sony U-18 Cup	Sony U-18 Cup
	CSA East Masters Competition	CSA East Masters Competition
	CSA East Classics Competition	CSA East Classics Competition
	CSA U-14 Cup	CSA U-14 Cup
	CSA U-16 Cup	CSA U-16 Cup
	Atlantic U-13 Championships	Atlantic U-13 Championships
	Atlantic U-14 Championships	Atlantic U-14 Championships
	Atlantic U-15 Championships	Atlantic U-15 Championships
	Atlantic U-16 Championships	Atlantic U-16 Championships
	Tier 1 U-14 Provincial Championships	Tier 1 U-14 Provincial Championships
	Tier 1 U-16 Provincial Championships	Tier 1 U-16 Provincial Championships
	Tier 1 U-18 Provincial Championships	Tier 1 U-18 Provincial Championships
	CIS Men's Soccer Championships	CIS Men's Soccer Championships
	CIS Women's Soccer Championships	CIS Women's Soccer Championships
	World Military Women's Championship	World Military Women's Championship
	CONCACAF Champions League	CONCACAF Champions League
	Nutrilite All Stars	Nutrilite All Stars
	ACAA Men's Championships	ACAA Men's Championships
	ACAA Women's Championships	ACAA Women's Championships
	NSSAF Junior Varsity Soccer Championships	NSSAF Junior Varsity Soccer Championships
	NSSAF Division 1 Boys Championship	NSSAF Division 1 Boys Championship
	NSSAF Division 1 Girls Championship	NSSAF Division 1 Girls Championship
	NSSAF Division 2 Boys Championship	NSSAF Division 2 Boys Championship
	NSSAF Division 2 Girls Championship	NSSAF Division 2 Girls Championship
	NSSAF Division 3 Boys Championship	NSSAF Division 3 Boys Championship
	NSSAF Division 3 Girls Championship	NSSAF Division 3 Girls Championship
	NSSAF Division 4 Boys Championship	NSSAF Division 4 Boys Championship
	NSSAF Division 4 Girls Championship	NSSAF Division 4 Girls Championship
	NSSAF Division 5 Girls Championship	NSSAF Division 5 Girls Championship
	NSSAF Division 5 Girls Championship	NSSAF Division 5 Girls Championship
	Soccer NS Provincials	Soccer NS Provincials
	CCAA Soccer National Championship - Men's	CCAA Soccer National Championship - Men's
	CCAA Soccer National Championship - Women's	CCAA Soccer National Championship - Women's
	Military World Cup - Mens	Military World Cup - Mens
	Military World Cup - Womens	Military World Cup - Womens
	FIFA Confederations Cup	FIFA World Cup
	FIFA U-20 World Cup	FIFA U-20 Women's World Cup
	FIFA U-17 World Cup	FIFA U-17 Women's World Cup
	CONCACAF Gold Cup	CONCACAF Women's Gold Cup
	CONCACAF U-20 Championship	CONCACAF Women's U-20 Championship
	CONCACAF U-17 Championship	CONCACAF Women's U-17 Championship

# Illustrative List of Potential Stadium Events 2015-2025

	2017	2018
<b>Football</b>	Grey Cup Vanier Cup The Canadian Bowl Football Canada Cup Flag Football National Championships U-16 Male Flag Football National Championships U-16 Female Flag Football National Championships U-18 Male Flag Football National Championships U-18 Female National Flag Football Championships U-15 Co-ed NSSAF Football Championships AUS Men's Football Championships AUS Women's Football Championships Loney Bowl Uteck Bowl	Grey Cup Vanier Cup The Canadian Bowl Football Canada Cup Flag Football National Championships U-16 Male Flag Football National Championships U-16 Female Flag Football National Championships U-18 Male Flag Football National Championships U-18 Female National Flag Football Championships U-15 Co-ed NSSAF Football Championships AUS Men's Football Championships AUS Women's Football Championships Loney Bowl
<b>Rugby</b>	NSSAF Rugby Championships ACAA Women's Rugby Championships ACAA Men's Rugby Championships AUS Women's Rugby Championships CIS Women's Rugby	NSSAF Rugby Championships ACAA Women's Rugby Championships ACAA Men's Rugby Championships AUS Women's Rugby Championships CIS Women's Rugby
<b>Lacrosse</b>	Women's Lacrosse World Cup	World Lacrosse Championship (mens)
<b>Field Hockey</b>	CIS Women's Field Hockey Championships Field Hockey Canada Superleague Field Hockey Canada National Championships Field Hockey Canada Under 16 Championships	CIS Women's Field Hockey Championships Field Hockey Canada Superleague Field Hockey Canada National Championships Field Hockey Canada Under 16 Championships
<b>Athletics</b>	Atlantic University Sport Championship - Men's Atlantic University Sport Championship - Women's CIS Championship - Men's CIS Championship - Women's NSSAF Provincial Championships Hershey Provincial Final Atlantic Hershey Championships Atlantic Track and Field Championships Canadian Masters Track & Field Championships The Legion Canadian Youth Track & Field Championships Canadian Junior Track & Field Championships Canadian Senior Track & Field Championships Aileen Meagher International Track Classic Canadian Track & Field Championships IAAF World Challenge IAAF Diamond League (International) NSSAF Track and Field District Meets and Regional Meets IAAF World Youth Championships in Athletics IAAF World Championships in Athletics Pan American Junior Athletic Championships	Atlantic University Sport Championship - Men's Atlantic University Sport Championship - Women's CIS Championship - Men's CIS Championship - Women's NSSAF Provincial Championships Hershey Provincial Final Atlantic Hershey Championships Atlantic Track and Field Championships Canadian Masters Track & Field Championships The Legion Canadian Youth Track & Field Championships Canadian Junior Track & Field Championships Canadian Senior Track & Field Championships Aileen Meagher International Track Classic Canadian Track & Field Championships IAAF World Challenge IAAF Diamond League (International) NSSAF Track and Field District Meets and Regional Meets IAAF World Junior Track and Field Trials IAAF World Junior Championships in Athletics Youth Summer Olympic Games
<b>Other</b>	NSSAF Cheerleading Championships Dalhousie University Convocation Ceremony St. Mary's University Convocation Ceremony International Children's Games North American Indigenous Games International World Games World Police and Fire Games	NSSAF Cheerleading Championships Dalhousie University Convocation Ceremony St. Mary's University Convocation Ceremony International Children's Games World Masters Games

## Illustrative List of Potential Stadium Events 2015-2025

	2019	2020
Soccer	CSA Challenge Trophy	CSA Challenge Trophy
	CSA Jubilee Trophy	CSA Jubilee Trophy
	CSA National Team Event	CSA National Team Event
	Sony U-18 Cup	Sony U-18 Cup
	CSA East Masters Competition	CSA East Masters Competition
	CSA East Classics Competition	CSA East Classics Competition
	CSA U-14 Cup	CSA U-14 Cup
	CSA U-16 Cup	CSA U-16 Cup
	Atlantic U-13 Championships	Atlantic U-13 Championships
	Atlantic U-14 Championships	Atlantic U-14 Championships
	Atlantic U-15 Championships	Atlantic U-15 Championships
	Atlantic U-16 Championships	Atlantic U-16 Championships
	Tier 1 U-14 Provincial Championships	Tier 1 U-14 Provincial Championships
	Tier 1 U-16 Provincial Championships	Tier 1 U-16 Provincial Championships
	Tier 1 U-18 Provincial Championships	Tier 1 U-18 Provincial Championships
	CIS Men's Soccer Championships	CIS Men's Soccer Championships
	CIS Women's Soccer Championships	CIS Women's Soccer Championships
	World Military Women's Championship	World Military Women's Championship
	CONCACAF Champions League	CONCACAF Champions League
	Nutrilite All Stars	Nutrilite All Stars
	ACAA Men's Championships	ACAA Men's Championships
	ACAA Women's Championships	ACAA Women's Championships
	NSSAF Junior Varsity Soccer Championships	NSSAF Junior Varsity Soccer Championships
	NSSAF Division 1 Boys Championship	NSSAF Division 1 Boys Championship
	NSSAF Division 1 Girls Championship	NSSAF Division 1 Girls Championship
	NSSAF Division 2 Boys Championship	NSSAF Division 2 Boys Championship
	NSSAF Division 2 Girls Championship	NSSAF Division 2 Girls Championship
	NSSAF Division 3 Boys Championship	NSSAF Division 3 Boys Championship
	NSSAF Division 3 Girls Championship	NSSAF Division 3 Girls Championship
	NSSAF Division 4 Boys Championship	NSSAF Division 4 Boys Championship
	NSSAF Division 4 Girls Championship	NSSAF Division 4 Girls Championship
	NSSAF Division 5 Girls Championship	NSSAF Division 5 Girls Championship
	NSSAF Division 5 Girls Championship	NSSAF Division 5 Girls Championship
	Soccer NS Provincials	Soccer NS Provincials
	CCAA Soccer National Championship - Men's	CCAA Soccer National Championship - Men's
	CCAA Soccer National Championship - Women's	CCAA Soccer National Championship - Women's
	Military World Cup - Mens	Military World Cup - Mens
	Military World Cup - Womens	Military World Cup - Womens
	FIFA Women's World Cup	FIFA U-20 Women's World Cup
	FIFA U-20 World Cup	FIFA U-17 Women's World Cup
	FIFA U-17 World Cup	CONCACAF Women's Gold Cup
	CONCACAF Gold Cup	CONCACAF Men's Pre-Olympic Tournament
	CONCACAF U-20 Championship	CONCACAF Women's Pre-Olympic Tournament
	CONCACAF U-17 Championship	CONCACAF Women's U-20 Championship
		CONCACAF Women's U-17 Championship

# Illustrative List of Potential Stadium Events 2015-2025

	2019	2020
<b>Football</b>	Grey Cup Vanier Cup The Canadian Bowl Football Canada Cup Flag Football National Championships U-16 Male Flag Football National Championships U-16 Female Flag Football National Championships U-18 Male Flag Football National Championships U-18 Female National Flag Football Championships U-15 Co-ed NSSAF Football Championships AUS Men's Football Championships AUS Women's Football Championships Loney Bowl Uteck Bowl	Grey Cup Vanier Cup The Canadian Bowl Football Canada Cup Flag Football National Championships U-16 Male Flag Football National Championships U-16 Female Flag Football National Championships U-18 Male Flag Football National Championships U-18 Female National Flag Football Championships U-15 Co-ed NSSAF Football Championships AUS Men's Football Championships AUS Women's Football Championships Loney Bowl
<b>Rugby</b>	NSSAF Rugby Championships ACAA Women's Rugby Championships ACAA Men's Rugby Championships AUS Women's Rugby Championships CIS Women's Rugby	NSSAF Rugby Championships ACAA Women's Rugby Championships ACAA Men's Rugby Championships AUS Women's Rugby Championships CIS Women's Rugby
<b>Lacrosse</b>		<b>World Lacrosse Championship (mens)</b>
<b>Field Hockey</b>	CIS Women's Field Hockey Championships Field Hockey Canada Superleague Field Hockey Canada National Championships Field Hockey Canada Under 16 Championships	CIS Women's Field Hockey Championships Field Hockey Canada Superleague Field Hockey Canada National Championships Field Hockey Canada Under 16 Championships
<b>Athletics</b>	Atlantic University Sport Championship - Men's Atlantic University Sport Championship - Women's CIS Championship - Men's CIS Championship - Women's NSSAF Provincial Championships Hershey Provincial Final Atlantic Hershey Championships Atlantic Track and Field Championships Canadian Masters Track & Field Championships The Legion Canadian Youth Track & Field Championships Canadian Junior Track & Field Championships Canadian Senior Track & Field Championships Aileen Meagher International Track Classic Canadian Track & Field Championships IAAF World Challenge IAAF Diamond League (International) NSSAF Track and Field District Meets and Regional Meets IAAF World Youth Championships in Athletics IAAF World Championships in Athletics Pan American Junior Athletic Championships	Atlantic University Sport Championship - Men's Atlantic University Sport Championship - Women's CIS Championship - Men's CIS Championship - Women's NSSAF Provincial Championships Hershey Provincial Final Atlantic Hershey Championships Atlantic Track and Field Championships Canadian Masters Track & Field Championships The Legion Canadian Youth Track & Field Championships Canadian Junior Track & Field Championships Canadian Senior Track & Field Championships Aileen Meagher International Track Classic Canadian Track & Field Championships IAAF World Challenge IAAF Diamond League (International) NSSAF Track and Field District Meets and Regional Meets IAAF World Junior Track and Field Trials IAAF World Junior Championships in Athletics Canadian Olympic Trials Olympic Summer Games Canadian Paralympic Trials Paralympic Summer Games
<b>Other</b>	NSSAF Cheerleading Championships Dalhousie University Convocation Ceremony St. Mary's University Convocation Ceremony International Children's Games Pan American Games Parapanamerican Games Commonwealth Youth Games North American Indigenous Games World Police and Fire Games Military World Games	NSSAF Cheerleading Championships Dalhousie University Convocation Ceremony St. Mary's University Convocation Ceremony International Children's Games

## Illustrative List of Potential Stadium Events 2015-2025

	2021	2022
Soccer	CSA Challenge Trophy	CSA Challenge Trophy
	CSA Jubilee Trophy	CSA Jubilee Trophy
	CSA National Team Event	CSA National Team Event
	Sony U-18 Cup	Sony U-18 Cup
	CSA East Masters Competition	CSA East Masters Competition
	CSA East Classics Competition	CSA East Classics Competition
	CSA U-14 Cup	CSA U-14 Cup
	CSA U-16 Cup	CSA U-16 Cup
	Atlantic U-13 Championships	Atlantic U-13 Championships
	Atlantic U-14 Championships	Atlantic U-14 Championships
	Atlantic U-15 Championships	Atlantic U-15 Championships
	Atlantic U-16 Championships	Atlantic U-16 Championships
	Tier 1 U-14 Provincial Championships	Tier 1 U-14 Provincial Championships
	Tier 1 U-16 Provincial Championships	Tier 1 U-16 Provincial Championships
	Tier 1 U-18 Provincial Championships	Tier 1 U-18 Provincial Championships
	CIS Men's Soccer Championships	CIS Men's Soccer Championships
	CIS Women's Soccer Championships	CIS Women's Soccer Championships
	World Military Women's Championship	World Military Women's Championship
	CONCACAF Champions League	CONCACAF Champions League
	Nutrilite All Stars	Nutrilite All Stars
	ACAA Men's Championships	ACAA Men's Championships
	ACAA Women's Championships	ACAA Women's Championships
	NSSAF Junior Varsity Soccer Championships	NSSAF Junior Varsity Soccer Championships
	NSSAF Division 1 Boys Championship	NSSAF Division 1 Boys Championship
	NSSAF Division 1 Girls Championship	NSSAF Division 1 Girls Championship
	NSSAF Division 2 Boys Championship	NSSAF Division 2 Boys Championship
	NSSAF Division 2 Girls Championship	NSSAF Division 2 Girls Championship
	NSSAF Division 3 Boys Championship	NSSAF Division 3 Boys Championship
	NSSAF Division 3 Girls Championship	NSSAF Division 3 Girls Championship
	NSSAF Division 4 Boys Championship	NSSAF Division 4 Boys Championship
	NSSAF Division 4 Girls Championship	NSSAF Division 4 Girls Championship
	NSSAF Division 5 Girls Championship	NSSAF Division 5 Girls Championship
	NSSAF Division 5 Girls Championship	NSSAF Division 5 Girls Championship
	Soccer NS Provincials	Soccer NS Provincials
	CCAA Soccer National Championship - Men's	CCAA Soccer National Championship - Men's
	CCAA Soccer National Championship - Women's	CCAA Soccer National Championship - Women's
	Military World Cup - Mens	Military World Cup - Mens
	Military World Cup - Womens	Military World Cup - Womens
	FIFA Confederations Cup	FIFA World Cup
	FIFA U-20 World Cup	FIFA U-20 Women's World Cup
	FIFA U-17 World Cup	FIFA U-17 Women's World Cup
	CONCACAF Gold Cup	CONCACAF Women's Gold Cup
	CONCACAF U-20 Championship	CONCACAF Women's U-20 Championship
	CONCACAF U-17 Championship	CONCACAF Women's U-17 Championship

# Illustrative List of Potential Stadium Events 2015-2025

	2021	2022
<b>Football</b>	Grey Cup Vanier Cup The Canadian Bowl Football Canada Cup Flag Football National Championships U-16 Male Flag Football National Championships U-16 Female Flag Football National Championships U-18 Male Flag Football National Championships U-18 Female National Flag Football Championships U-15 Co-ed NSSAF Football Championships AUS Men's Football Championships AUS Women's Football Championships Loney Bowl Uteck Bowl	Grey Cup Vanier Cup The Canadian Bowl Football Canada Cup Flag Football National Championships U-16 Male Flag Football National Championships U-16 Female Flag Football National Championships U-18 Male Flag Football National Championships U-18 Female National Flag Football Championships U-15 Co-ed NSSAF Football Championships AUS Men's Football Championships AUS Women's Football Championships Loney Bowl
<b>Rugby</b>	NSSAF Rugby Championships ACAA Women's Rugby Championships ACAA Men's Rugby Championships AUS Women's Rugby Championships CIS Women's Rugby	NSSAF Rugby Championships ACAA Women's Rugby Championships ACAA Men's Rugby Championships AUS Women's Rugby Championships CIS Women's Rugby
<b>Lacrosse</b>	Women's Lacrosse World Cup	World Lacrosse Championship (mens)
<b>Field Hockey</b>	CIS Women's Field Hockey Championships Field Hockey Canada Superleague Field Hockey Canada National Championships Field Hockey Canada Under 16 Championships	CIS Women's Field Hockey Championships Field Hockey Canada Superleague Field Hockey Canada National Championships Field Hockey Canada Under 16 Championships
<b>Athletics</b>	Atlantic University Sport Championship - Men's Atlantic University Sport Championship - Women's CIS Championship - Men's CIS Championship - Women's NSSAF Provincial Championships Hershey Provincial Final Atlantic Hershey Championships Atlantic Track and Field Championships Canadian Masters Track & Field Championships The Legion Canadian Youth Track & Field Championships Canadian Junior Track & Field Championships Canadian Senior Track & Field Championships Aileen Meagher International Track Classic Canadian Track & Field Championships IAAF World Challenge IAAF Diamond League (International) NSSAF Track and Field District Meets and Regional Meets IAAF World Youth Championships in Athletics IAAF World Championships in Athletics Pan American Junior Athletic Championships	Atlantic University Sport Championship - Men's Atlantic University Sport Championship - Women's CIS Championship - Men's CIS Championship - Women's NSSAF Provincial Championships Hershey Provincial Final Atlantic Hershey Championships Atlantic Track and Field Championships Canadian Masters Track & Field Championships The Legion Canadian Youth Track & Field Championships Canadian Junior Track & Field Championships Canadian Senior Track & Field Championships Aileen Meagher International Track Classic Canadian Track & Field Championships IAAF World Challenge IAAF Diamond League (International) NSSAF Track and Field District Meets and Regional Meets IAAF World Junior Track and Field Trials IAAF World Junior Championships in Athletics Youth Summer Olympic Games
<b>Other</b>	NSSAF Cheerleading Championships Dalhousie University Convocation Ceremony St. Mary's University Convocation Ceremony International Children's Games North American Indigenous Games International World Games World Police and Fire Games	NSSAF Cheerleading Championships Dalhousie University Convocation Ceremony St. Mary's University Convocation Ceremony International Children's Games Commonwealth Games World Masters Games

## Illustrative List of Potential Stadium Events 2015-2025

	2023	2024
Soccer	CSA Challenge Trophy	CSA Challenge Trophy
	CSA Jubilee Trophy	CSA Jubilee Trophy
	CSA National Team Event	CSA National Team Event
	Sony U-18 Cup	Sony U-18 Cup
	CSA East Masters Competition	CSA East Masters Competition
	CSA East Classics Competition	CSA East Classics Competition
	CSA U-14 Cup	CSA U-14 Cup
	CSA U-16 Cup	CSA U-16 Cup
	Atlantic U-13 Championships	Atlantic U-13 Championships
	Atlantic U-14 Championships	Atlantic U-14 Championships
	Atlantic U-15 Championships	Atlantic U-15 Championships
	Atlantic U-16 Championships	Atlantic U-16 Championships
	Tier 1 U-14 Provincial Championships	Tier 1 U-14 Provincial Championships
	Tier 1 U-16 Provincial Championships	Tier 1 U-16 Provincial Championships
	Tier 1 U-18 Provincial Championships	Tier 1 U-18 Provincial Championships
	CIS Men's Soccer Championships	CIS Men's Soccer Championships
	CIS Women's Soccer Championships	CIS Women's Soccer Championships
	World Military Women's Championship	World Military Women's Championship
	CONCACAF Champions League	CONCACAF Champions League
	Nutrilite All Stars	Nutrilite All Stars
	ACAA Men's Championships	ACAA Men's Championships
	ACAA Women's Championships	ACAA Women's Championships
	NSSAF Junior Varsity Soccer Championships	NSSAF Junior Varsity Soccer Championships
	NSSAF Division 1 Boys Championship	NSSAF Division 1 Boys Championship
	NSSAF Division 1 Girls Championship	NSSAF Division 1 Girls Championship
	NSSAF Division 2 Boys Championship	NSSAF Division 2 Boys Championship
	NSSAF Division 2 Girls Championship	NSSAF Division 2 Girls Championship
	NSSAF Division 3 Boys Championship	NSSAF Division 3 Boys Championship
	NSSAF Division 3 Girls Championship	NSSAF Division 3 Girls Championship
	NSSAF Division 4 Boys Championship	NSSAF Division 4 Boys Championship
	NSSAF Division 4 Girls Championship	NSSAF Division 4 Girls Championship
	NSSAF Division 5 Girls Championship	NSSAF Division 5 Girls Championship
	NSSAF Division 5 Girls Championship	NSSAF Division 5 Girls Championship
	Soccer NS Provincials	Soccer NS Provincials
	CCAA Soccer National Championship - Men's	CCAA Soccer National Championship - Men's
	CCAA Soccer National Championship - Women's	CCAA Soccer National Championship - Women's
	Military World Cup - Mens	Military World Cup - Mens
	Military World Cup - Womens	Military World Cup - Womens
	FIFA Women's World Cup	FIFA U-20 Women's World Cup
	FIFA U-20 World Cup	FIFA U-17 Women's World Cup
	FIFA U-17 World Cup	CONCACAF Women's Gold Cup
	CONCACAF Gold Cup	CONCACAF Men's Pre-Olympic Tournament
	CONCACAF U-20 Championship	CONCACAF Women's Pre-Olympic Tournament
	CONCACAF U-17 Championship	CONCACAF Women's U-20 Championship
		CONCACAF Women's U-17 Championship

# Illustrative List of Potential Stadium Events 2015-2025

	2023	2024
<b>Football</b>	Grey Cup Vanier Cup The Canadian Bowl Football Canada Cup Flag Football National Championships U-16 Male Flag Football National Championships U-16 Female Flag Football National Championships U-18 Male Flag Football National Championships U-18 Female National Flag Football Championships U-15 Co-ed NSSAF Football Championships AUS Men's Football Championships AUS Women's Football Championships Loney Bowl Uteck Bowl	Grey Cup Vanier Cup The Canadian Bowl Football Canada Cup Flag Football National Championships U-16 Male Flag Football National Championships U-16 Female Flag Football National Championships U-18 Male Flag Football National Championships U-18 Female National Flag Football Championships U-15 Co-ed NSSAF Football Championships AUS Men's Football Championships AUS Women's Football Championships Loney Bowl
<b>Rugby</b>	NSSAF Rugby Championships ACAA Women's Rugby Championships ACAA Men's Rugby Championships AUS Women's Rugby Championships CIS Women's Rugby	NSSAF Rugby Championships ACAA Women's Rugby Championships ACAA Men's Rugby Championships AUS Women's Rugby Championships CIS Women's Rugby
<b>Lacrosse</b>		<b>World Lacrosse Championship (mens)</b>
<b>Field Hockey</b>	CIS Women's Field Hockey Championships Field Hockey Canada Superleague Field Hockey Canada National Championships Field Hockey Canada Under 16 Championships	CIS Women's Field Hockey Championships Field Hockey Canada Superleague Field Hockey Canada National Championships Field Hockey Canada Under 16 Championships
<b>Athletics</b>	Atlantic University Sport Championship - Men's Atlantic University Sport Championship - Women's CIS Championship - Men's CIS Championship - Women's NSSAF Provincial Championships Hershey Provincial Final Atlantic Hershey Championships Atlantic Track and Field Championships Canadian Masters Track & Field Championships The Legion Canadian Youth Track & Field Championships Canadian Junior Track & Field Championships Canadian Senior Track & Field Championships Aileen Meagher International Track Classic Canadian Track & Field Championships IAAF World Challenge IAAF Diamond League (International) NSSAF Track and Field District Meets and Regional Meets IAAF World Youth Championships in Athletics IAAF World Championships in Athletics Pan American Junior Athletic Championships	Atlantic University Sport Championship - Men's Atlantic University Sport Championship - Women's CIS Championship - Men's CIS Championship - Women's NSSAF Provincial Championships Hershey Provincial Final Atlantic Hershey Championships Atlantic Track and Field Championships Canadian Masters Track & Field Championships The Legion Canadian Youth Track & Field Championships Canadian Junior Track & Field Championships Canadian Senior Track & Field Championships Aileen Meagher International Track Classic Canadian Track & Field Championships IAAF World Challenge IAAF Diamond League (International) NSSAF Track and Field District Meets and Regional Meets IAAF World Junior Track and Field Trials IAAF World Junior Championships in Athletics Canadian Olympic Trials Olympic Summer Games Canadian Paralympic Trials Paralympic Summer Games
<b>Other</b>	NSSAF Cheerleading Championships Dalhousie University Convocation Ceremony St. Mary's University Convocation Ceremony International Children's Games Pan American Games Parapanamerican Games Commonwealth Youth Games North American Indigenous Games World Police and Fire Games Military World Games	NSSAF Cheerleading Championships Dalhousie University Convocation Ceremony St. Mary's University Convocation Ceremony International Children's Games



## Illustrative List of Potential Stadium Events 2015-2025

### 2025

---

#### Soccer

CSA Challenge Trophy  
CSA Jubilee Trophy  
CSA National Team Event  
Sony U-18 Cup  
CSA East Masters Competition  
CSA East Classics Competition  
CSA U-14 Cup  
CSA U-16 Cup  
Atlantic U-13 Championships  
Atlantic U-14 Championships  
Atlantic U-15 Championships  
Atlantic U-16 Championships  
Tier 1 U-14 Provincial Championships  
Tier 1 U-16 Provincial Championships  
Tier 1 U-18 Provincial Championships  
CIS Men's Soccer Championships  
CIS Women's Soccer Championships  
World Military Women's Championship  
CONCACAF Champions League  
NutraLite All Stars  
ACAA Men's Championships  
ACAA Women's Championships  
NSSAF Junior Varsity Soccer Championships  
NSSAF Division 1 Boys Championship  
NSSAF Division 1 Girls Championship  
NSSAF Division 2 Boys Championship  
NSSAF Division 2 Girls Championship  
NSSAF Division 3 Boys Championship  
NSSAF Division 3 Girls Championship  
NSSAF Division 4 Boys Championship  
NSSAF Division 4 Girls Championship  
NSSAF Division 5 Girls Championship  
NSSAF Division 5 Girls Championship  
Soccer NS Provincials  
CCAA Soccer National Championship - Men's  
CCAA Soccer National Championship - Women's  
Military World Cup - Mens  
Military World Cup - Womens  
FIFA Confederations Cup  
FIFA U-20 World Cup  
FIFA U-17 World Cup  
CONCACAF Gold Cup  
CONCACAF U-20 Championship  
CONCACAF U-17 Championship

## Illustrative List of Potential Stadium Events 2015-2025

### 2025

<b>Football</b>	Grey Cup
	Vanier Cup
	The Canadian Bowl
	Football Canada Cup
	Flag Football National Championships U-16 Male
	Flag Football National Championships U-16 Female
	Flag Football National Championships U-18 Male
	Flag Football National Championships U-18 Female
	National Flag Football Championships U-15 Co-ed
	NSSAF Football Championships
	AUS Men's Football Championships
	AUS Women's Football Championships
	Loney Bowl
	<b>Uteck Bowl</b>
<b>Rugby</b>	NSSAF Rugby Championships
	ACAA Women's Rugby Championships
	ACAA Men's Rugby Championships
	AUS Women's Rugby Championships
	CIS Women's Rugby
<b>Lacrosse</b>	<b>Women's Lacrosse World Cup</b>
<b>Field Hockey</b>	CIS Women's Field Hockey Championships
	Field Hockey Canada Superleague
	Field Hockey Canada National Championships
	Field Hockey Canada Under 16 Championships
<b>Athletics</b>	Atlantic University Sport Championship - Men's
	Atlantic University Sport Championship - Women's
	CIS Championship - Men's
	CIS Championship - Women's
	NSSAF Provincial Championships
	Hershey Provincial Final
	Atlantic Hershey Championships
	Atlantic Track and Field Championships
	Canadian Masters Track & Field Championships
	The Legion Canadian Youth Track & Field Championships
	Canadian Junior Track & Field Championships
	Canadian Senior Track & Field Championships
	Aileen Meagher International Track Classic
	Canadian Track & Field Championships
	IAAF World Challenge
	<b>IAAF Diamond League (International)</b>
<b>Other</b>	NSSAF Track and Field District Meets and Regional Meets
	<b>IAAF World Youth Championships in Athletics</b>
	<b>IAAF World Championships in Athletics</b>
	<b>Pan American Junior Athletic Championships</b>
	NSSAF Cheerleading Championships
	Dalhousie University Convocation Ceremony
<b>Other</b>	St. Mary's University Convocation Ceremony
	International Children's Games
	<b>North American Indigenous Games</b>
	<b>International World Games</b>
	<b>World Police and Fire Games</b>

# Appendix D

---

**Entertainment Market Analysis  
and Building Infrastructure  
Requirements**

---

This page intentionally left blank

# **ENTERTAINMENT MARKET ANALYSIS AND BUILDING INFRASTRUCTURE REQUIREMENTS**

---

This report has been prepared as part of a Stadium Consultation and Business Planning study undertaken for the Halifax Regional Municipality by a consulting team led by Sierra Planning and Management.

The portion of the work addressed in this present report is an assessment of the market potential for large scale live entertainment events in the proposed Stadium, and identification of the capital implications of fitting the Stadium up for live entertainment events.

## **RELATED REPORTS**

A Case Studies report covering recent trends and developments in stadium construction and use was prepared under separate cover.

## **PURPOSE OF THIS REPORT**

Stadia in many other centres are used for large-scale live entertainment events. Halifax has played host to large-scale entertainment events in the past.

This section of the report therefore examines the potential for the Halifax Stadium as a future live entertainment venue. The type of events under examination are those with the capacity to draw 20,000 or more spectators and which qualify under the HRM Events Strategy as “spectacle events.” In particular, these events serve the large-scale outdoor summer concert market.

This report provides, first, an analysis of the market conditions in Atlantic Canada and the HRM both on the demand side (audiences) and supply side (product, venues) as an input to the study of the Stadium’s overall business plan. It reports on the results of a focus group held with HRM events stakeholders.

Second, this report identifies the infrastructure requirements needed to outfit the Stadium to support large-scale live entertainment events as a secondary use.

Together these two perspectives will assist the HRM in making an informed decision as to whether to include entertainment uses in its considerations of the design and management of the proposed Stadium.

## **EXECUTIVE SUMMARY**

### **MARKET SIZE FOR LARGE SCALE ENTERTAINMENT IN THE STADIUM**

This report assumes that the market for a large scale live entertainment venue in the HRM is necessarily bigger than the population of central Nova Scotia. It is assumed that audiences for entertainment products

would come to Halifax from surrounding areas in Atlantic Canada<sup>1</sup> – travel distance being determined by the “pull” of the attraction -- the bigger the name of the act, the greater the market base.

The primary market base for large-scale entertainment events in HRM is drawn from across Atlantic Canada (excluding Newfoundland) with a total population of just over 2 million. Halifax is located within a 5-hour drive of most of the population base in the Maritime Provinces.

However, the viability of the market is reduced somewhat by its dispersal over 3 provinces.

Compared to denser eastern North American markets, such as Toronto, Boston, Montreal and Washington, D.C., Atlantic Canada on the whole is a secondary destination when it comes to large marquee attractions of the kind that can draw over 20,000 spectators.

These types of attractions are typically only viable for one stop in Atlantic Canada.

## **VENUES FOR LIVE ENTERTAINMENT**

While Atlantic Canada constitutes a secondary market for major tour circuits, a wide range of attractions have been hosted in large outdoor settings, particularly since 2005.

Large outdoor sites are preferred as they can accommodate larger audiences than fixed seat venues. Audiences also enjoy being outside in the summer months, when much of this activity occurs.

Key outdoor sites capable of hosting 20,000 or more in Atlantic Canada (outside HRM) are:

- Magnetic Hill Festival Grounds, Moncton, NB
- Université de Moncton Stadium, Moncton, NB
- Charlottetown Driving Park Entertainment Centre, Charlottetown, PE
- Proposed Event Site (Former Imperial Oil Lands), Charlottetown, PE
- Cavendish Beach Event Site, Cavendish Beach, PE
- Truro Raceway, Truro, NS

Outdoor sites in HRM capable of hosting 20,000 or more are:

- Halifax Commons
- Citadel Hill Garrison Grounds

(For reference purposes, the Appendix to this report lists other HRM-area venues which host entertainment events for over 1,000 patrons, and other Atlantic Canada venues which can accommodate 10,000 or more audience members).

## **LARGE SCALE ENTERTAINMENT PRODUCT AND AUDIENCES FOR LIVE ENTERTAINMENT**

Large scale entertainment product for outdoor venues over 20,000 are often brought in as a special draw or as headliners for existing festivals. These acts do not always follow the same intensive tour schedules or

---

<sup>1</sup> Due to travel distances between Newfoundland and the rest of Atlantic Canada, the Atlantic Canada market is assumed in this report to consist of New Brunswick, Nova Scotia and Prince Edward Island.

flows that are seen in the arena show circuit, which generally benefits from a closely spaced string of similar facilities.

Historically, marquee international acts which come to major festivals have played only one location in Atlantic Canada. Municipalities and major venues thus compete for high profile acts.

In the past 5-6 years, there have been several large-scale concerts staged in Atlantic Canada. Past acts have included the Rolling Stones, Paul McCartney, U2, AC/DC, Kiss, The Eagles, Aerosmith, and the Black Eyed Peas. Attendance to the shows has varied but has been anywhere between 12,000-80,000 in recent years.

Charlottetown, Moncton and Halifax tend to have at least one major event (20,000+) per year during the summer months. Smaller communities, such as Truro, Canso, and Summerside have also made attempts to draw major acts to the community, or are the host of annual festivals (Stan Rogers Festival, Dutch Mason Blues Festival) which attract bigger name acts.

The Magnetic Hill Music Festival in Moncton is an annual event with an average attendance of approximately 54,000 and a median attendance of 47,500 over the last 6 years.

Shows on the Halifax Commons have attracted about 25,000-30,000, while Charlottetown has attracted up to 30,000 to one-off shows in the past.

In each community, there is typically 1 or a maximum of 2 shows of this scale in any given summer. In addition there are often a number of outdoor summer shows or festivals with audiences in the 10,000 range.

## **CAPITAL CONSIDERATIONS FOR LARGE SCALE ENTERTAINMENT IN THE STADIUM**

This report takes the position that live performance might be an occasional use for the Stadium. Based on the market analysis and advice of event promoters consulted during this study, large scale live performances drawing 20,000 or more spectators in HRM are feasible only once or twice per season. This suggests that investment in the Stadium for this purpose should be minimal.

Augmentation of the public facilities in the Stadium for large-scale concerts would need to include additional capacity (i.e. washroom, vendor, first aid and emergency service, ticket sales and ticket taking, security and front of house accommodations), most of which could be met with portable or temporary facilities for once a season use.

Augmentation of support facilities in the Stadium for large-scale performance would also be required. Large-scale events having regional draw would typically have significant staging and technical requirements with related infrastructure needs exceeding what is needed to support the Stadium's primary uses.

Augmentation would also be required for vehicular access and parking and for backstage set-up, including wardrobe and dressing rooms, production offices, storage, etc. The latter could be met through trailers and other temporary facilities.

In addition, the in-field would need the capacity to support heavy loads, and will need to have structural bearing areas and anchor points.

Basic infrastructure to support performance systems and equipment (i.e. power feeds and large scale wiring ducts) would also be needed. Generators can be used if the base building power supply is not sufficiently diversified.

## **RECOMMENDATIONS REGARDING LARGE SCALE ENTERTAINMENT IN THE STADIUM**

This report recommends that use of the Stadium for large-scale live performance events be occasional, and notes that a significant investment in supporting infrastructure for live performance events is not justified by the capacity of the market. Most of the needs of occasional events could be met through temporary and portable facilities.

However, it is recommended that the Stadium be given the capacity for augmentation for occasional events through provision of additional site area, access points, and basic infrastructure.

## **ATLANTIC CANADA CONSUMER MARKET**

---

The overall population base within a reasonable travel radius is the best general indicator of whether a given market would be a desirable place for a live entertainment attraction to play.

Clearly, promoters prefer to book in the biggest and most dense markets to maximize their revenue potential.

### **TOTAL AUDIENCE POTENTIAL AND SIZE OF RESIDENT MARKET**

Halifax Regional Municipality (HRM) is Atlantic Canada's largest population centre with a total population of about 372,679 (2006). It is also the principal urban centre of Nova Scotia which has a total population of 913,462 (2006).

Driving times to Halifax from the furthest centres in Nova Scotia are no more than 5 hours. Driving distances to Halifax from key centres in mainland Atlantic Canada are 3-5 hours. The total population of Prince Edward Island, Nova Scotia and New Brunswick is 1.8 million.

Location	Approximate Drive Time
Sydney, NS	5 hours
Yarmouth, NS	4 hours
Moncton, NB	3 hours
Charlottetown, PE	4 hours
Fredericton, NB	5 hours
Saint John, NB	5 hours

This report assumes that the market for a large-scale live entertainment venue in the HRM is necessarily bigger than the population of central Nova Scotia. It is assumed that audiences for entertainment products



would come to Halifax from surrounding areas in mainland Atlantic Canada – travel distance being determined by the “pull” of the attraction -- the bigger the name of the act, the greater the market base.

This report assumes that, on the face of it, the Stadium’s size and prominence would make it appropriate for marquee attractions, provided such attractions made only one stop in Atlantic Canada; there is only sufficient mass in the Atlantic Canada market to support one stop by any given marquee act.

## **TOURISM PROFILE**

The percentage of tourists who are in Nova Scotia for other purposes who might patronize a marquee attraction is unknown. The assumption is that a relatively small percentage of tourists fit the demographic profile of large-scale entertainment attendees and would therefore select large-scale live entertainment as part of their Nova Scotia experience.

Nevertheless, in 2010, 2.1 million tourists visited Nova Scotia, 88% of whom were Canadians. Canadian visitors included nearly 1.2 million from Atlantic Canada, nearly 100,000 from Quebec, over 450,000 from Ontario, and more than 140,000 from Western Canada. Visitors from the UK and from New England were also numerous.

Total visitation by road was more than 1.5 million (72%), while air visitation exceeded 600,000 (28%.)

In the June-September high season of 2010, there were:

- Nearly 1.1 million visitors (54% of annual) overall;
- Including 490,200 visitors from Atlantic Canada; and
- About 780,000 road visitors.

## **COMPARATIVE SIZE OF THE ATLANTIC CANADA MARKET**

Marquee acts will be drawn to play in markets where the overall population size and density ensure maximum revenue potential. Since they have the capacity to draw from a wide area, these acts tour to sites that are closely spaced.

Major markets in Northeastern North American which have little or no overlap include:

Market	City Population	Metro Population
Mainland Atlantic Canada	NA	1.8 million
Boston	620,000	4.5 million
Montreal	1.6 million	3.6 million
Toronto	2.5 million	5.1 million
New York	8.1 million	18 million
Philadelphia	1.5 million	6.1 million
Washington	600,000	5.6 million

With very few exceptions, the HRM has too few people to support a large-scale entertainment attraction. At just under 2 million people, mainland Atlantic Canada is a viable market but this viability is reduced by its

dispersal over three provinces. Only acts with very significant drawing power would have the capacity to attract 20,000 or more spectators.

These facts make Atlantic Canada a secondary destination at best for the large marquee attractions, all other considerations aside.

## **LARGE CONCERT VENUES IN ATLANTIC CANADA MARKET**

While Atlantic Canada is a secondary market on the major tour circuit, over the last several years it nevertheless has hosted a wide variety of attractions in large-scale concert settings outdoors during the summer.

While indoor concerts do occur in this period, outdoor events typically outnumber indoor events. Outdoor events also tend to have sites which can accommodate many more patrons than the indoor venues. Greater audience potential translates into greater revenue potential for promoters. Also, Canadian audiences enjoy being outdoors in the warm weather, rain or shine.

In addition to Halifax, Moncton and Charlottetown have distinguished themselves through consistently hosting large-scale events.

## **CONCERT SITES OUTSIDE HRM**

<b>Venue, Location</b>	<b>Venue Type</b>	<b>Approximate Maximum Capacity</b>	<b>Recent Attractions</b>
Magnetic Hill Festival Grounds, Moncton, NB	Outdoor Venue	80,000	<ul style="list-style-type: none"> <li>▪ U2 and Arcade Fire (July 2011)</li> <li>▪ AC/DC (August 2009)</li> <li>▪ Bon Jovi, Bachman-Cummings (June 2009)</li> <li>▪ Eagles, John Fogerty, KT Tunstall, Sam Roberts (August 2008)</li> <li>▪ Tim McGraw and Faith Hill (September 2007)</li> <li>▪ Brooks N Dunn, Alan Jackson (2006)</li> <li>▪ Rolling Stones (September 2005)</li> </ul>
Cavendish Beach Event Venue, Cavendish, PE	Outdoor Venue	65,000	<ul style="list-style-type: none"> <li>▪ Cavendish Beach Music Festival (2011 Line-up includes Trace Adkins, Lennie Gallant, Johnny Reid, Ricky Skaggs, Brad Paisley, Corb Lund, George Canyon, Toby Keith, Tanya Tucker)</li> </ul>
Charlottetown Driving Park Entertainment Centre, Charlottetown, PE	Outdoor Venue	30,000	<ul style="list-style-type: none"> <li>▪ Aerosmith and Cheap Trick (2007)</li> <li>▪ Black Eyed Peas, Pussycat Dolls (2006)</li> </ul>
Truro Raceway, Truro, NS	Outdoor Venue	25,000	<ul style="list-style-type: none"> <li>▪ Dutch Mason Blues Festival</li> </ul>
Université de Moncton Stadium, Moncton, NB	Outdoor Venue	20,725	<ul style="list-style-type: none"> <li>▪ Olympic Torch Event (2010)</li> </ul>
Imperial Oil Site, Charlottetown, PE (proposed new events)	Outdoor Venue	20,000	Not yet constructed

site)			
Confederation Landing Park, Charlottetown, PE	Outdoor Venue	Capped at 10,000 due to local resident concerns (actual capacity is 15,000)	<ul style="list-style-type: none"> <li>▪ Meat Loaf, Tragically Hip, Eddie Money (2011)</li> <li>▪ BTO, Matt Mays, Great Big Sea (July 2010)</li> <li>▪ Nickelback (July 2007)</li> <li>▪ Matt Mays &amp; El Torpedo (June 2006)</li> </ul>

### **Magnetic Hill Festival Grounds**

The Magnetic Hill Festival Grounds in Moncton, New Brunswick is the key competitor to Halifax's large-scale outdoor events.

Over the last few years, the City of Moncton and its partners have heavily invested in infrastructure improvements to the site. In 2008, the Province of New Brunswick provided \$1.2 million towards infrastructure enhancements to the site, including:

- Enhancement to power sources;
- Artists' backstage and administration area;
- Washrooms; and
- Crowd control barricades.

Other site upgrades over the years have included a permanent stage pad and infrastructure and road work. Over the last decade the City has spent approximately \$2 million toward making the site more attractive to bands and promoters as well as concert-goers.

The facility is not typically used outside of the Magnetic Hill Festival event (1-2 times per year).

### **Université de Moncton Stadium**

The Moncton Stadium on the campus of the Université de Moncton opened in 2010. It is a track and field stadium built to host the IAAF 2010 World Junior Championships in Athletics. The first event to take place at the Stadium, even before its completion, was the Olympic Torch event as it passed through Moncton.

The facility has 10,000 permanent seats (expandable to 20,725).

The Moncton Stadium hosts university soccer, various signature football events, and major events such as track championships. It has the ability to accommodate outdoor concerts but as of yet no concerts have been hosted nor are planned for the facility.

### **Charlottetown Driving Park Entertainment Centre, Charlottetown PE**

Charlottetown Driving Park is a Province-owned race track that opened in the late 1800s. Recently, the site was redeveloped to include a gaming facility.

The Driving Park played host to two large-scale concerts in 2006 and 2007, but has not been used since.

### **Confederation Landing Park, Charlottetown, PE**

For several years, the annual Canada Day celebrations in Charlottetown (formerly known as the Festival of Lights and now known as Summer Fest) have taken place over three days in Confederation Landing Park.

Confederation Landing Park is situated on the Charlottetown Waterfront. During the summer free concerts of local musicians also take place on the site.

Capacity is generally capped at 10,000 due to local resident concerns, but the actual capacity of the site is 15,000.

Typically the site hosts anywhere between 3-6 events per year, a mix of City-organized and outside partner organized events. Examples of events include Winterfest and the Summerfest concert series.

The larger concerts will soon be moved to a new outdoor multi-event space to be located on the former Imperial Oil lands in downtown Charlottetown. The new site will accommodate 15,000-20,000 and will be primarily a green space, but will have a concert pad and other infrastructure required to accommodate outdoor events. When complete, most major events will be moved to this site rather than Confederation Landing Park.

Charlottetown is moving away from pursuing the higher end of major events and instead supporting the nearby Cavendish Beach venue for all large-scale events over 20,000.

#### **Cavendish Beach Event Venue, Cavendish Beach, PE**

This site developed in 2009 hosts the annual Cavendish Beach Music Festival of country music. Its capacity is 65,000. Attendance to a recent concert (Taylor Swift) attracted 35,000.

A permanent stage was added in 2010.

#### **Truro Raceway, Truro, NS**

The Truro Raceway is the province's largest harness racing facility, and is part of the Nova Scotia Provincial Exhibition Commission.

The Dutch Mason Blues Festival takes place over three days in August at the Truro Raceway. The capacity of the facility is in the range of 25,000.

#### **CONCERT SITES IN HRM**

Venue, Location	Venue Type	Approximate Maximum Capacity	Site Description	Recent Attractions
Halifax Commons, Halifax, NS	Outdoor Venue	100,000	City owned green space in centre of the City; has been used as a host site for marquee acts and events.	<ul style="list-style-type: none"><li>▪ Alan Jackson, Johnny Reid, George Canyon, Lonestar (August 2010)</li><li>▪ Black Eyed Peas, Weezer (July 2010)</li><li>▪ Paul McCartney (July 2009)</li><li>▪ Kiss (July 2009)</li><li>▪ Keith Urban, Charlie Major (August 2008)</li><li>▪ Rolling Stones, Kanye West, Alice Cooper, Sloan (September 2006)</li></ul>

Citadel Hill, Halifax, NS	Outdoor Venue	30,000	City owned space, has been used as host site for major acts and festivals.	<ul style="list-style-type: none"> <li>▪ Metallica (July 2011)</li> <li>▪ Hey Ocean! (July 2011)</li> <li>▪ Nickelback (July 2007)</li> <li>▪ Sloan, Finger Eleven</li> </ul>
------------------------------	------------------	--------	---	---

### **Halifax Commons**

In the last six years, a total of 6 major concerts have been held at the Halifax Commons (7 event-days), or up to 2 major concerts per year. This site has been the subject of a great deal of scrutiny by those who see the Halifax Commons as a public amenity more suitable for passive use.

There has been an investment however in the infrastructure on this site, which includes an electrical upgrade to the fountain completed in 2008. In 2009, the City purchased a generator for concerts on the Common at a cost of \$72,000 plus HST.

The full capacity of the site is an estimated 100,000. The largest event to be produced on the site was the Papal visit in 1984, which had an estimated 75,000-80,000 attendees.

### **Citadel Hill**

Citadel Hill is a City-owned site where many special events take place including about 1-2 concerts per year. The capacity of the site is up to 30,000.

### **SMALLER VENUES**

For reference, the Appendix to this report contains a list of venues in HRM over 1,000 seats. However for the purposes of examining the viability of including an entertainment focus in the proposed Stadium, relevant facilities are those with capacities exceeding 20,000.

## **MARQUEE PRODUCT IN THE ATLANTIC CANADA MARKET**

---

As noted earlier in this report, the Atlantic Canadian market is a secondary one for marquee acts, who tend to focus on the densest markets such as Toronto, Montreal and Vancouver.

Yet several communities have been successful in attracting major acts during the summer months for one-off concerts. Below is a summary of the events history of the last 5 or so years across Atlantic Canada.

### **MARQUEE ACTS OUTSIDE HRM**

#### **Magnetic Hill**

Since 2005, the Magnetic Hill concert site has been the venue for several high profile artists' performances (0-2 per year, with 1 most years). Upcoming and recent events are as follows:

- U2 and Arcade Fire (July 2011)
- AC/DC (August 2009)
- Bon Jovi, Bachman-Cummings (June 2009)
- Eagles, John Fogerty, KT Tunstall, Sam Roberts (August 2008)
- Tim McGraw and Faith Hill (September 2007)
- Brooks N Dunn, Alan Jackson (2006)
- Rolling Stones (September 2005)

In addition to the drawing power of the attractions, Magnetic Hill's central location in the Atlantic Canada market positions it favourably in the market.

The City of Moncton credits its success in part to its support from concert promoter Donald K. Donald Events whose track record as a producer has been instrumental in the City's ability to secure high profile acts.

### **Charlottetown Driving Park**

Aerosmith and Cheap Trick headlined the Blast at the Beach show in 2007, with an estimated attendance of 30,000. The previous year the Black Eyed Peas and Pussycat Dolls were the main attraction.

The facility has not been used for a major concert since 2007.

### **Cavendish Beach Event Site**

Established in 2009, the annual Cavendish Beach Music Festival is a major festival of country music, featuring about 20 acts over 5 days. The site has a capacity of about 65,000, and attendance exceeded 100,000 (over the 5 days of the festival) in 2010.

Acts have included:

- Trace Adkins, Lennie Gallant, Johnny Reid, Ricky Skaggs, Brad Paisley, Corb Lund, George Canyon, Toby Keith, Tanya Tucker (2011)
- Keith Urban, Little Big Town, Taylor Swift, Lady Antebellum, Emerson Drive, Ashley MacIsaac (2010)
- Tim McGraw, Big & Rich, Reba McEntire, Doc Walker, Aaron Lines (2009)

### **Charlottetown Confederation Landing**

Charlottetown hosts a Canada Day celebration which generally includes a marquee concert or concerts. This has been called the Festival of Lights and, more recently, Summerfest. This year's event takes place June 30-July 2, 2011 with concerts each evening, headlined in turn by Meat Loaf, Tragically Hip and Eddie Money.

Past attractions have included Cirque du Soleil, Live with Regis and Kelly, BTO (2010), Great Big Sea (2010), Nickelback (2007), and Matt Mays & El Torpedo (2006).

The City of Charlottetown and the Charlottetown Area Development Corporation recently acquired lands in the downtown from Imperial Oil which they intend to develop as a new event site to accommodate 15,000-20,000. Signature events will primarily be moved to this new site once it is ready.

### **Truro Racetrack**

The 7<sup>th</sup> annual Dutch Mason Blues Festival takes place at the Truro Racetrack. Previous festivals have had attendance of 18,000.

Acts this year will include James Cotton, Los Lonely Boys and Robert Randolph.

## **MARQUEE ACTS IN HRM**

### **Halifax Commons**

The average number of events per year on the Commons has fluctuated between 0 and 2. Most concerts were organized in conjunction with Power Promotional Events, which recently ceased operations.

Power Promotions estimated that 40% of concert goers came from outside Halifax.

Past acts in the last 5 years were:

- Alan Jackson, Johnny Reid, George Canyon, Lonestar (August 2010)
- Black Eyed Peas, Weezer (July 2010)
- Paul McCartney (July 2009)
- Kiss (July 2009)
- Keith Urban, Charlie Major (August 2008)
- Rolling Stones, Kanye West, Alice Cooper, Sloan (September 2006)

### **Citadel Hill**

Several concerts have taken place at Citadel Hill in the last 5 years.

The most high profile act to play Citadel Hill will be Metallica this coming July. (Nickelback played Citadel Hill in 2007.) Other past acts have included Sloan and Finger Eleven. Hey Ocean! is also scheduled to perform on the Hill in July.

## **TOUR FLOWS**

### **One Stop Only in Atlantic Canada**

Frequently, marquee acts drawing 20,000 or more are brought in as a special draw or feature of existing festivals. These acts do not follow the same intensive tour schedules or flows that are seen in the arena show circuit (mostly 10,000 capacity venues), which generally benefits from a closely spaced string of similar facilities.

Historically, marquee international acts which come to major festivals have played only one location in Atlantic Canada. Municipalities and major venues thus compete for high profile acts.

A review of a sample of major acts currently scheduled to play in Atlantic Canada (U2, Metallica, Kiss, Great Big Sea, Trooper, Meat Loaf, 54.40) reveals the following patterns:

- Typically one of 1-3 Canadian dates on tour leg
- Typically a last stop on a tour, or special 'deviation' from tour flow
- Often continues or comes from Europe

- Often continues or comes from East Coast United States
- Sometimes continues or comes from Quebec
- Newfoundland follows somewhat different rules from other Atlantic provinces
- The festival circuit has a logic of its own (e.g. tours may take acts from BC to Ontario to Newfoundland, back to BC, back to Ontario, back to Atlantic Canada, back to Alberta in the space of a month)

The review of large outdoor concert history in Atlantic Canada over the past 5 years demonstrates there are generally opportunities for no more than 1-2 major concerts of over 20,000 attendees in any given community.

In addition, each major act generally makes only one stop in Atlantic Canada.

## AUDIENCES IN THE ATLANTIC CANADA MARKET

---

### AT VENUES OUTSIDE HRM

#### Magnetic Hill

Magnetic Hill was first used in 1984 to host Pope John Paul II's visit to Moncton and really took off in 2005 after a Rolling Stones concert that attracted upwards of 80,000.

Attendance figures are as follows:

Headliner	Year	Estimated Attendance	Source
U2	2011	TBA	NA
AC/DC	2009	70,000	DKD Events
Bon Jovi	2009	33,000	Canadian Press
Eagles	2008	45,000-55,000	The Guardian, DKD Events
Tim McGraw/Faith Hill	2007	50,000	Power Promotions/Canadian Press
Brooks N Dunn	2006	45,000	Wikipedia
Rolling Stones	2005	80,000	DKD Events

This translates to an average of 54,000 attendees per show, with a median attendance of 47,500.

#### Charlottetown Driving Park

The Blast at the Beach show in 2007 had an estimated attendance of 30,000.

#### Cavendish Beach Event Site

About 35,000 patrons attended the Taylor Swift concert at this venue in 2010.

#### Charlottetown Confederation Landing



In the past, capacity for the site has been capped at 10,000.

### **Truro Raceway**

Last year's Dutch Mason Blues Festival attracted an estimated 18,000 patrons.

## **AT VENUES IN HRM**

### **Halifax Commons**

The number of attendees per show has ranged from about 12,000-50,000, with an average of about 29,000 and a median attendance of 26,000.

Headliner	Year	Estimated Attendance	Source
Alan Jackson, Johnny Reid, George Canyon, Lonestar	2010	10,009 (paid)	CBC News
Black Eyed Peas, Weezer	2010	8,362 (paid), total approx. 20,000	CBC News
Paul McCartney	2009	26,504 (paid)	CBC News
Kiss	2009	21,402 (paid)	CBC News
Keith Urban, Charlie Major	2008	11,853 (paid)	CBC News
Rolling Stones, Kanye West, Alice Cooper, Sloan	2006	50,000	CBC.ca

### **Citadel Hill**

There is little data on attendance figures for acts having performed at Citadel Hill, but the capacity of Citadel Hill is up to 30,000.

Typically 1-2 events annually are held on this site.

## **PROMOTERS' PERSPECTIVE ON LIVE ENTERTAINMENT IN THE STADIUM**

---

The consultations for the Stadium's Business Plan included a focus group discussion with a number of the promoters who are active in the HRM and Atlantic Canada market.

Their comments reflected both their collective experience and a consensus about the relationship of the Stadium to market realities and future needs.

The outcomes from this discussion have been summarized into a number of themes:

### **Market Size**

Participants continually emphasized that Halifax was a very small market in relation to presentations which might draw 20,000 or more and that the market was not capable of supporting more than one or two such offerings per year.

### **Product Availability**

Participants noted that there are fewer and fewer attractions available which are capable of drawing audiences in excess of 20,000 and that the future of this scale of presentation was uncertain.

### **Scale of the Stadium**

Even if market conditions were better, the proposed Stadium is very large. Participants felt that making it a feasible location for major live events will require investment which would be better spent on existing sites.

Venues need to be “right sized” for the market. The current need is not for a large event site but for a site for events drawing between 7,000 and 12,000. Another site for large events would have negative impact on the existing Commons and Garrison sites.

### **Location of the Stadium**

Although no site has been identified, participants expressed concern about the implications for transit and neighbourhood context related to some possible locations.

### **Venue Planning**

Participants believe that there is a need to make all venue decisions in the context of a comprehensive, long-term plan for live venues in the HRM. Before making investment decisions about the Stadium, Halifax needs to figure out its overall needs and priorities first.

### **Possible Uses for the Stadium**

Participants recognized that the Stadium could have a role as an occasional site for civic and ethno-cultural celebrations. It would be a safe and secure event site with adequate public amenities. Participants also recognized that such uses, while desirable at a civic level, would not contribute to the business case for the Stadium.

### **Role of HRM**

Participants believe that HRM’s role is to provide efficient facilities and that it should not be involved in underwriting events. HRM’s goal should be to make the existing venues better for both the presenters and the audiences.

In this regard, providing adequate infrastructure is key. HRM should also strive to be a user-friendly provider and facilitate the use of its venues and sites. Participants noted that the presenter’s access to food and beverage revenues is often the break point between financial success or failure in events.

### **Conclusion**

Participants felt that the Stadium should be more of a “parks and rec” facility rather than a cultural facility and that there was no case to be made for it as a venue for live performance events.

## Significance of the Promoter Comments

The opinions expressed in these discussions must be regarded both as those of experts and of actual users.

# CAPITAL DEVELOPMENT IMPLICATIONS FOR LARGE SCALE LIVE PERFORMANCE EVENTS IN HALIFAX STADIUM

---

## LIVE PERFORMANCE AS SECONDARY USE FOR STADIUM

The principal and most frequent use of the stadium will be for soccer and other sport events. For these uses, the in-field will serve as the game surface. Live performance would be a secondary use in the Stadium.

Based on the large concert market analysis which appears elsewhere in this report and on the advice of event promoters in HRM, large scale live performance would be feasible only once or twice per season.

For the purposes of this report, the scale of live performance events is deemed to be those defined by the HRM Events Policy as “spectacle events” which would draw 20,000 or more spectators.

When used for live performance, the Stadium in-field would be the site of the performance stage and for much of the spectator seating and standing. Use of some of the permanent seating bleachers could be expected.

## PUBLIC AREAS OF THE BASE BUILDING

This report assumes that the front-of-house accommodations which are included in the base building to support soccer and other sporting events will be sufficient to support the seating capacity of the venue (i.e., 20,000 spectators) for any use, but that these public facilities would need to be augmented on a per-occasion basis to support those events which substantially extend the venue’s capacity.

## AUGMENTATION OF PUBLIC FACILITIES FOR LARGE SCALE CONCERTS

Augmentation of public accommodations to support substantially increased attendance would include additional:

- Washroom capacity
- Vendor and concession capacity
- First aid and emergency service capacity
- Ticket sales and ticket taking capacity
- Security capacity
- Front of house staff accommodations

While less than ideal, most of these requirements could be met with portable/temporary facilities.

## **SUPPORT AREAS FOR LARGE SCALE PERFORMANCE**

While there are public facilities in the Stadium's base building, there are few support facilities in the base building to serve large scale live performance.

This report assumes that these events will have a regional (i.e., NS, NB and PEI) draw and, as such, will have significant staging and technical requirements having infrastructure needs that exceed what might be required to support the primary uses.

## **AUGMENTATION OF SUPPORT FACILITIES FOR LARGE SCALE PERFORMANCE**

### **Vehicular Access and Parking**

The staging for these events will be delivered in multiple trucks, have multi-day set up requirements with large set-up and running crews. A substantial bus/truck yard with full perimeter security will be required including:

- Truck access from nearest main artery
- Truck turning in loading yard for highway vans
- Truck loading docks and/or truck access to in-field
- Truck parking and trailer spotting for empty vans
- Parking for buses travelling with the tour
- Artist trailers/catering trailer parking
- Broadcast truck parking
- Limo and car access and parking
- Crew and show staff parking
- First aid and ambulance parking

The size of the yard will depend on the availability nearby of tractor-trailer parking. This yard will, however, need to be within the security perimeter of the event.

Trucks will also require access through the bleacher tier: a means of removing and replacing the affected seating tiers quickly will be required.

### **Backstage Set-up**

Some of the team facilities in the Stadium may be suitable for temporary use for backstage functions. The following functions will need to be provided to accommodate a backstage population of not fewer than 100 persons to support large scale live performance:

- Production office
- Staff and crew room
- Backstage security
- Wardrobe room
- Artist dressing rooms
- Instrument storage/service room
- Green Room and catering
- Media room and interview room
- Secure storage

- Touring case storage

While less than ideal, most of these requirements could be met in trailers and other temporary facilities.

### **Performance Stage in the In-field**

The performance stage will be a pre-engineered structure assembled on site consisting of a stage deck and access ways, overhead grid and rain cover, control and lighting towers.

The in-field will need to be capable of supporting the heavy point loads of the trucks that will deliver the pre-engineered structure and the performance lighting and sound equipment.

Other requirements include:

- Structural bearing areas (to support point loads of staging and towers on the in-field)
- Structural anchor points (for securing up-lift loads to the in-field sub-structure)

### **Live Performance Technical Infrastructure**

The basic infrastructure to support the performance systems and equipment will include:

- Power feeds and disconnects (for lights, winches)
- Power feeds and disconnects (for audio and communications technical ground power)
- Power, control and signal wiring ducts from stage to control positions

If the capacity of the base building power supply does not have sufficient diversity, portable silent generators may be provided.

## **CONCLUSIONS REGARDING LIVE PERFORMANCE INFRASTRUCTURE**

This report assumes that use of the Stadium for large scale live performance events will be occasional and that significant investment in supporting infrastructure is not justified.

However, some augmentation is recommended if the decision is made to use the Stadium for large scale live performance events.

## **RECOMMENDED AUGMENTATION**

- Provision of additional site area to support temporary front of house facilities with surface preparation, heavy vehicle access and hook-ups
- Provision of additional site area for a secure bus/truck yard with suitable surface preparation, heavy vehicle access and hook-ups
- Provision for heavy vehicle access onto the site, through the bleachers and on the in-field will be required
- Provision of in-field sub-structure to support heavy vehicle access, point and up-lift loads
- Provision of sub-grade power and signal ducting
- Provision of diversity within capacity of base building power
- Provision of tractor-trailer parking on site or nearby

## **EVENT PROMOTERS' FOCUS GROUP**

---

A discussion of the potential relationship between the proposed FIFA Stadium and live event presentations was held at Alderney Gate from 1:30 to 3:30 on Tuesday May 31 2011.

The project steering committee was represented by Kim Mason (Chair), Peter Spurway (Vice-chair) and Betty Lou Killan (HRM staff.) Brian Arnott facilitated on behalf of the study team.

The events community was represented by:

- Billy Comer, HRM Events
- Andree Gracie, independent promoter
- Stuart Jolliffe, Destination Halifax
- Grant MacDonald, Events Nova Scotia
- Waye Mason, independent promoter
- Al Zink, retired promoter

## VENUE INFORMATION

### ALL ATLANTIC CANADA VENUES (10,000+)



## ALL ATLANTIC CANADA VENUES (10,000+)

Venue, Location	Venue Type	Approximate Maximum Capacity	Recent Attractions
Magnetic Hill Festival Grounds, Moncton, NB	Outdoor Venue	80,000	<ul style="list-style-type: none"> <li>▪ U2 and Arcade Fire (July 2011)</li> <li>▪ AC/DC (August 2009)</li> <li>▪ Bon Jovi, Bachman-Cummings (June 2009)</li> <li>▪ Eagles, John Fogerty, KT Tunstall, Sam Roberts (August 2008)</li> <li>▪ Tim McGraw and Faith Hill (September 2007)</li> <li>▪ Brooks N Dunn, Alan Jackson (2006)</li> <li>▪ Rolling Stones (September 2005)</li> </ul>
Cavendish Beach Event Venue, Cavendish, PE	Outdoor Venue	65,000	<ul style="list-style-type: none"> <li>▪ Cavendish Beach Music Festival (2011 Line-up includes Trace Adkins, Lennie Gallant, Johnny Reid, Ricky Skaggs, Brad Paisley, Corb Lund, George Canyon, Toby Keith, Tanya Tucker)</li> </ul>
Charlottetown Driving Park Entertainment Centre, Charlottetown, PE	Outdoor Venue	30,000	<ul style="list-style-type: none"> <li>▪ Aerosmith and Cheap Trick (2007)</li> <li>▪ Black Eyed Peas, Pussycat Dolls (2006)</li> </ul>
Truro Raceway, Truro, NS	Outdoor Venue	25,000	<ul style="list-style-type: none"> <li>▪ Dutch Mason Blues Festival</li> </ul>
Université de Moncton Stadium, Moncton, NB	Outdoor Venue	20,725	<ul style="list-style-type: none"> <li>▪ Olympic Torch Event (2010)</li> </ul>
Imperial Oil Site, Charlottetown, PE (proposed new events site)	Outdoor Venue	20,000	Not yet constructed
Confederation Landing Park, Charlottetown, PE	Outdoor Venue	Capped at 10,000 due to local resident concerns (actual capacity is 15,000)	<ul style="list-style-type: none"> <li>▪ Meat Loaf, Tragically Hip, Eddie Money (2011)</li> <li>▪ BTO, Matt Mays, Great Big Sea (July 2010)</li> <li>▪ Nickelback (July 2007)</li> <li>▪ Matt Mays &amp; El Torpedo (June 2006)</li> </ul>



## ALL HRM VENUES (1,000+)

Venue, Location	Venue Type	Approximate Maximum Capacity	Site Description	Recent Attractions
Halifax Commons, Halifax, NS	Outdoor Venue	100,000	City owned green space in centre of the City; has been used as a host site for marquee acts and events.	<ul style="list-style-type: none"> <li>Alan Jackson, Johnny Reid, George Canyon, Lonestar (August 2010)</li> <li>Black Eyed Peas, Weezer (July 2010)</li> <li>Paul McCartney (July 2009)</li> <li>Kiss (July 2009)</li> <li>Keith Urban, Charlie Major (August 2008)</li> <li>Rolling Stones, Kanye West, Alice Cooper, Sloan (September 2006)</li> </ul>
Citadel Hill, Halifax, NS	Outdoor Venue	30,000	City owned space, has been used as host site for major acts and festivals.	<ul style="list-style-type: none"> <li>Metallica (July 2011)</li> <li>Hey Ocean! (July 2011)</li> <li>Nickelback (July 2007)</li> <li>Sloan, Finger Eleven</li> </ul>
Metro Centre, Halifax, NS	Indoor Venue	13,000	City owned arena - suitable for large events 10,000 and under	<ul style="list-style-type: none"> <li>Royal Nova Scotia International Tattoo, Quidam (Cirque du Soleil), music concerts (e.g. Celtic Thunder, Reba McEntire, Elton John).</li> </ul>
Alderney Landing, Dartmouth, NS	Outdoor Venue	15,000 (8,000 for ticketed events)	Convention centre operated by nonprofit organization with outdoor plaza used for concerts and celebrations	<ul style="list-style-type: none"> <li>The Trews</li> <li>Arcade Fire and Owen Pallet (July 2011)</li> <li>Broken Social Scene and Ted Leo &amp; the Pharmacists (August 2011)</li> <li>Dartmouth Multicultural Festival</li> <li>Canada Day Celebrations</li> </ul>
Huskies Stadium, Halifax	Outdoor Venue	11,000	St. Mary's University football stadium; capacity has been expanded for exhibition games in the past - no concerts held here in past	<ul style="list-style-type: none"> <li>Touchdown Atlantic</li> </ul>
Halifax Forum and Multipurpose Room, Halifax	Indoor Venue	5,860	City-owned arena with multipurpose centre	<ul style="list-style-type: none"> <li>Steve Aoki, NOFX, Obscura</li> </ul>
Cunard Event Centre, Halifax	Indoor Venue	4,000	Privately owned banquet and events facility	<ul style="list-style-type: none"> <li>Billy Talent, DJ Tiesto</li> </ul>
Rebecca Cohn Auditorium, Halifax	Indoor Venue	1,000	University owned and operated theatre	<ul style="list-style-type: none"> <li>Rosanne Cash, Lorrie Morgan &amp; Pam Tillis</li> </ul>

### **Metro Centre**

The Halifax Metro Centre is a City-owned arena that hosts dozens of concerts, trade shows and other events. It has 10,500 fixed seats and a capacity for concerts of up to 13,000 (360 degree stage set up). The facility has the flexibility to be set up as a concert bowl, half bowl and full concert set up. It is also used extensively for hockey and basketball.

Past and upcoming entertainment events include the Royal Nova Scotia International Tattoo (attendance of about 60,000 total for 8 shows), Quidam (Cirque du Soleil) (5 event days), as well as several music concerts (e.g. Celtic Thunder, Reba McEntire, Elton John).

### **Alderney Landing Events Plaza**

Alderney Landing Cultural Convention Centre is operated by a nonprofit organization in Dartmouth and consists of a convention centre space with several meeting rooms and a 285-seat theatre. There is also an art gallery and market on site.

Its outdoor plaza is also used for a number of large concerts (approximately 4-5 per year).

Its capacity is 15,000 for ungated (free) events, such as Canada Day; and 8,000 for gated (ticketed) events.

Arcade Fire and Owen Pallet will play Alderney Landing in July. In August, the site will host mFest which is being headlined by Broken Social Scene. The Trews will also perform at Alderney Landing.

Past events have included Canada Day celebrations and the Dartmouth Multicultural Festival (which moved to Halifax Seaport this year).

### **Huskies Stadium**

The Huskies Stadium is an aging stadium located on the St. Mary University Campus dedicated to sports activities. This facility is not currently used for concerts but has the flexibility to expand to a capacity of 11,000.

### **Cunard Event Centre**

The Cunard Event Centre is a privately owned and operated 45,000 sq ft space on the Halifax Seaport. The facility can accommodate dinners for up to 2,200 and concerts for up to 4,000.

The facility hosts approximately 3 events per month, including many trade shows (e.g. Atlantic Wedding Showcase, Entrepreneurship Expo, Eco-Expo, Wines Festival, Craft Show), and concerts (e.g. INXS, DJ Tiesto, benefit concerts), and charity events (e.g. dinner and silent auction, brunches, galas).

### **Halifax Forum Arena and Multipurpose Centre**

The Halifax Forum is a city-owned arena which has 4,610 in fixed seating and can accommodate an additional 1,250 on the floor when the ice is not in use for a total capacity of 5,860.

The Forum also has a multipurpose centre with standing-room capacity of up to 2,200.

### **Festival Tent (Lower Water at Salter Street Extension)**

The TD Halifax Jazz Festival takes place over 9 days and has an average attendance in the range of 50,000-100,000 with a total of about 65,000 expected attendees in any given year.

Acts play in many venues across town of varying sizes and use the Festival Tent in downtown Halifax as the site for free acts in the daytime and flagship acts in the evenings.

Preservation Hall Jazz Band, Dignable Planets and Nomadic Massive are among the acts scheduled to play at the Jazz Festival this year.

### **Halifax Seaport**

The Halifax Seaport is a district that includes Pier 21, NSCAD, and the Cunard Centre. Events held at the Seaport include:

The Halifax Seaport Beerfest, a festival including some musical entertainment and held under tent and canopy. It has a projected attendance of 4,000 overall and attendance is capped at a maximum of 1,500 per session.

The Multicultural Festival generally held in Dartmouth is now taking place in Halifax (one year only for now). The Festival features food, music, dance, arts and crafts, workshops and displays, attracting about 46,000 visitors per year over a 4-day period.

### **Rebecca Cohn Auditorium**

The Rebecca Cohn Auditorium is part of the Dalhousie Arts Centre and is owned and operated by Dalhousie University. Halifax's premier theatre, it has fixed seating of 1,000. There are typically more than 10 events per month including dance shows, music concerts, opera performances, and comedy performances.

---

This page intentionally left blank

# Appendix E

---

**Locational Criteria**

---

This page intentionally left blank

## LOCATIONAL CRITERIA

---

A locational analysis is not part of the work program under Phase 1 of the stadium analysis which is focused primarily on facility feasibility. The assessment of feasibility cannot be developed in isolation of locational considerations. For this reason, a set of locational or siting criteria has been developed. Locational criteria should not be weighted equally as some criteria hold a higher importance in terms of its ability to compromise the viability of the project. Criteria related to site size, transportation considerations, land remediation requirements and potential negative impact on adjacent land uses should be given priority. Suggested locational criteria include:

Site Characteristics and Location
1. Capacity to accommodate building footprint and potential future building footprint/appropriate outdoor uses
2. Consistency with Provincial and Municipal strategic and land use planning policy (e.g. zoning considerations)
3. Proximity to existing or planned clusters of community sports facilities and other compatible/complimentary uses
4. On-site parking availability (both public and private)
5. Off-site parking availability (both public and private)
6. Venue visibility for naming rights (i.e. will location and surrounding environment enhance the image of the facility)
7. Is the site centrally located (in general terms) relative to schools, post secondary institutions and other feeder institutions
Transportation
1. Ease of access by foot
2. Ease of access by bicycle
3. Ease of access via local public transit
4. Ease of access via inter-regional modes of transportation (bus/train)
5. Regional automobile access
6. Local automobile access/egress – impact
7. Charter bus / truck parking and loading-related access
Costs and Ease of Acquiring Development Land
1. Cost of land acquisition
2. Replacement of existing valuable land uses
3. Timing (assemble property, remediation, servicing, planning approvals and construction)
4. Proximity to other facilities and/or land and/or infrastructure (for potential synergies in terms of access to centralized parking or other operational support)
5. Likelihood of site (in relative terms) to generate extraordinary development costs

### Urban Context/Design Opportunities

1. Relative likelihood for contributing to urban regeneration
2. Design opportunity to create a signature building and focus (site lines, historic influence, visual / physical relationship to other civic buildings, exposure, etc.)
3. Ability for infield an ancillary space to meet community deficit for recreational facilities and amenities (as identified in the Recreational Master Plan Update)

### Economic and Property Impact

1. Enhancement of immediate site context – street vitality and walkability (in relative terms)
2. Positive impact on existing local retail/commercial/ accommodations sectors
3. Competition with existing spectator facilities
4. Competition with existing participant-based recreation facilities
5. Potential to attract new local retail / commercial / accommodations
6. Potential to host major events and/or tournaments
7. Negative impact on residential neighbourhoods
8. Opportunity costs (lost opportunity if facility is placed on-site)
9. Potential to enhance the image of the Municipality (branding opportunity)



# Appendix F

---

## **Illustrative Financial Proformas**

---

This page intentionally left blank

**Halifax Stadium Business Plan**  
**Indicative Financial Performance:**  
**Scenario 1**

---

This page intentionally left blank

**Halifax Regional Municipality**  
**Stadium - Indicative Financial Performance**  
**Field Programming By Month**

Spring-Fall

Scenario 1

											Premium Rate (2011 Rate +25%)	Annual Revenue
Activity		April	May	June	July	August	September	October	November	Total		
Prime Time		Mon-Friday, 5-11pm & Sat-Sun, 8-11pm				60 hrs per week						
	Total Allocation %	Total Allocation Distributed Evenly by Month - Note Individual Sports Field Use Demand Profiles will vary										
Soccer	55%	86	119	125	125	119	106	79	66	825	\$147.50	
Football (All levels, Flag, Tackle)	20%	31	43	46	46	43	38	29	24	300	\$147.50	
Lacrosse	5%	8	11	11	11	11	10	7	6	75	\$147.50	
Field Hockey	5%	8	11	11	11	11	10	7	6	75	\$147.50	
Rugby	5%	8	11	11	11	11	10	7	6	75	\$147.50	
Other (Ultimate, Corporate Use)	10%	16	22	23	23	22	19	14	12	150	\$147.50	
School Board (principally non-Prime)	0%	0	0	0	0	0	0	0	0	0	\$147.50	
Total	100%	156	216	228	228	216	192	144	120	1,500	\$147.50	\$221,250.00
% of Prime Time		65%	90%	95%	95%	90%	80%	60%	50%			Risk: 10% fee loss for lost rental during event set-up/take-down
Total Prime Available		240	240	240	240	240	240	240	240			
Non-Prime Time		Mon-Friday, 8-5pm, 11-12pm & Sat-Sun, 11-12pm				52 hrs per week						
% Use		38%	38%	29%	0%	0%	29%	48%	48%	19%		
Daily hours booked		4	4	3	0	0	3	5	5			
Monthly		80	80	60	0	0	60	100	100	480	\$115	\$55,200

**B. Winter Bubbling - Assume 4 month Operation**

4 month Operation	Hours Available	Price per 1/3 Field	% Rented as 1/3 Field	Price Per Full Field	% Rented as Full Field	Utilization	Revenue	Risk Discount	Business Plan Base Case
Prime Time	960	\$150.00	70%	\$300	30%	75%	\$291,600	50%	\$145,800
Non-Prime Time	832	\$125.00	45%	\$240	55%	45%	\$112,601	10%	\$101,300

Note: Rate is blended youth and adult rate

**Halifax Regional Municipality**  
**Stadium - Indicative Financial Performance**  
**Concession and Building Revenues**

**Scenario** **1**

**Note: For Ticketed Events occurring Annually Only**

Event Concession Revenues/Costs	persons	Average Per Capita Expenditure	Cost of Sales	
Participants (Events only)	5,000	\$5.00		\$25,000.00
Spectators	60,000	\$4.00		\$240,000.00
Gross Sales				\$265,000.00
Cost of Sales	65%			(\$172,250.00)
Net Sales				\$92,750.00
Merchandising Sales - from Ticket Events Only	19,500	\$5.00	65.00%	\$34,125.00
Note: vending and other F&B from daily participants (field rentals)				
Prime Time only	hours	Participants (assume 2 hour rentals)		
	2,460	36,900	\$2.00	65.00%
				\$25,830.00

Advertising				
Naming Rights by Facility Component				
Track Boards	\$30,000.00	15 boards @ \$2,000		Limited without Franchise
Major Event (Game) Sponsorship		Pursue with Corporate and Government Sector - assume no sponsorship to cover facility costs of event and ticketing		
Major Game Board Advertising (occasional only)	\$75,000.00	30 boards (half field)	\$2,500	e.g. National Team Soccer
Discount by 2/3rd to reflect infrequency per year	\$24,750.00			
Facility Naming Rights	\$50,000.00	per annum on 10 Year escalated basis		
Total	\$104,750.00			
Advertising Marketing Cost	0.00%	covered in expenses		
Net	\$104,750.00			

Tenant Office/Commercial Rent (offices, retail and fitness centre)			
Gross Leasable Area (GLA)	19,000 sq. ft.	20,000	sq.ft. gross
Lease Rate (incl. share of building utility and maintenance costs)	\$17.50 /sq. ft.	Space varies in quality due to fenestration of building exterior only	
Occupancy	60%		
Net Rent	\$199,500.00 p.a.		

Note: Leasable space is 50% of building useable space. Balance is for building function systems (common area, washrooms sized for build-out of grandstand (expansion), change rooms, management offices, loading, housekeeping and storage.

**Halifax Regional Municipality**  
**Stadium - Indicative Financial Performance**  
**Concession and Building Revenues**

**Scenario 1**

**Note: For Ticketed Events occurring Annually Only**

					Gross Revenue
<b>Example:</b>					
<i>CSA National Team Game</i>					
Ticket Ranges (BMO comparator - Men's Senior)		Discount - Halifax	% seating	Average Attendance	\$0.00
Club seats	75.00	56.25	20.00%		\$0.00
Mid Range	50.00	37.50	50.00%		\$0.00
Low Range	30.00	22.50	30.00%		
		Av. Price	\$36.75	8,000	\$294,000.00
Ticketing service rebate	5.0%				(\$14,700.00)
Net					\$279,300.00
Discount: Game Frequency	1	per	year	0%	\$0.00
<i>Uteck Bowl:</i>					
		\$37.00	20.00%		
		\$27.00	40.00%		
		\$17.00	30.00%		
		\$10.00	10.00%		
		Av. Price	\$24.30	7,500	\$182,250.00
Ticketing service rebate	5%				(\$9,112.50)
Discount: Game Frequency	1	per 2 years	50% discount		\$86,568.75
<i>Loney Bowl</i>					
			\$12.00	4,000.00	\$48,000.00
Discount: Game Frequency	1	per year	0% discount		\$0.00
No ticketing service - on-site and on-line					

**Major National and International Tournament Events - FIFA World Cups, National/International Athletics Games (if accommodated)**

1. All such events are at risk owing to bid process
2. Per the assumptions of the business plans for typical showcase events, staging costs and gross receipts from ticketed venues assumed to be break-even
3. Financial Model excludes one-off event staging expenses and revenues.
4. Very infrequent events such as Vanier Cup are excluded - these events if attracted will significantly assist gross revenues in those years
5. A larger number of provincial and regional events are possible and expected but are likely not ticketed.

**Entertainment Event**

Assume 1 per	3 years		
Base rent charged plus event facility costs (building not placed at financial risk for success of event)	\$10,000.00 per day	3 days	\$30,000.00
Discount for frequency	\$10,000.00 p.a.		

Halifax Regional Municipality

Stadium - Indicative Financial Performance

Expenses

City Own/Third Party Operate	Scenario	1
------------------------------	----------	---

Expense Category	Description	Itemization of Cost					
<b>1. Annual Salary and Wage Costs</b>	Facility Manager	FTE	1	\$100,000	plus	20.00%	Benefits \$120,000.00
	Assistant Manager/Administrator		1	\$65,000	plus	20.00%	Benefits \$78,000.00
	Facility Operations and Maintenance Supervisor		1	\$40,000	plus	20.00%	Benefits \$48,000.00
	Facility Maintenance Staff		3	\$40,000	plus	20.00%	Benefits \$144,000.00
	Event Services/Sales and Marketing		1	\$45,000	plus	20.00%	Benefits \$54,000.00
	<b>Sub-Total</b>		<b>7</b>				<b>\$444,000</b>
	PT Event Staff (Major Events)	Average 50 staff		\$11.00	/hr	20.00%	Benefits \$165,000.00
	Event Concession/Food and Beverage Staff	Included in cost of sales					
	Payroll-related Expenses					7.00%	\$42,630.00
	<b>Total Staffing Costs</b>						<b>\$651,630</b>
<b>Operational Expenses</b>	2. Utilities	Building (12 month operation)	\$3.00	per square foot	40,000	sq.ft.	\$120,000.00
		Flood Lighting (International TV Standard to 1400-1700 Lux per FIFA requirements) / community standards lower	\$125.00	Blended Average			\$114,625.00
		Other - heat, water and services, lighting	\$2.50				\$100,000.00
	<b>Total Utilities</b>						<b>\$334,625</b>
<b>Stadium Operating, Maintenance and Repair</b>	3a. Administration (Clothing, office supplies and equipment, communications)						\$10,000.00
	3c. Repair and Maintenance incl. field	\$3.50 per hour for field plus other					\$30,600.00
	3d. Janitorial contract and supplies	Washrooms, corridors, change rooms and offices	\$2,000	per month	plus	\$30,000	\$54,000.00
	3e. Grounds maintenance and Snow Removal	Supplies and equipment costs, City snow removal assumed					\$10,000.00
	3f. Event costs (excluding PT labour)	Allocation based on potential event schedule					\$100,000.00
	3f. Waste Management	Supplement to City Services as needed					\$5,000.00
	<b>Sub-Total Item 3</b>						<b>\$209,600</b>
4 Marketing Costs	Assumed bulk of event attraction, advertising and promotion undertaken by other agencies of City and Province		\$20,000	per year			\$20,000
	Based on comparables (BMO field) and adjusted for expected average attendance; Option for City to cover facility under City Policy; Sales and marketing salaries identified under Payroll costs		\$50,000	per year			\$50,000
			\$0.00	per square foot			\$0.00
							\$10,000.00
							\$20,000.00
	includes rental of machinery to haul and erect; plus storage		\$50,000.00	per set-up/take-down			\$100,000.00
	<b>Sub-Total Other Expenses</b>						<b>\$200,000</b>
<b>Sub-Total Operational Expenses Before Capital Reserve and Management Fee</b>							<b>\$1,395,855.00</b>
10. Management Fee							\$200,000.00
	11. Capital Reserve Fund						\$280,000
<b>Total Annual Expenses</b>							<b>\$1,875,855</b>



# Halifax Regional Municipality

## Stadium - Indicative Financial Performance

### 20 Year Operating Revenue/Cost Projections

Scenario 1											
Assumes Normalized Revenues/Costs (no ramp-up)											
		Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Escalation (p.a.)	3%	1.00	1.03	1.06	1.09	1.13	1.16	1.19	1.23	1.27	1.30
<b>Revenue</b>											
Field Revenue											
Field Revenue - Spring- Fall Prime time		\$221,250	\$227,888	\$234,724	\$241,766	\$249,019	\$256,489	\$264,184	\$272,110	\$280,273	\$288,681
Field Revenue - Spring- Fall Non-Prime time		\$55,200	\$56,856	\$58,562	\$60,319	\$62,128	\$63,992	\$65,912	\$67,889	\$69,926	\$72,023
Field Revenue - Winter Bubble - Prime time		\$145,800	\$150,174	\$154,679	\$159,320	\$164,099	\$169,022	\$174,093	\$179,316	\$184,695	\$190,236
Field Revenue - Winter Bubble - Non-Prime time		\$101,300	\$104,339	\$107,469	\$110,693	\$114,014	\$117,434	\$120,957	\$124,586	\$128,324	\$132,174
Annual Ticketed Events		\$447,681	\$461,112	\$474,945	\$489,193	\$503,869	\$518,985	\$534,555	\$550,591	\$567,109	\$584,122
Total Field Related Revenue		\$971,231	\$1,000,368	\$1,030,379	\$1,061,291	\$1,093,129	\$1,125,923	\$1,159,701	\$1,194,492	\$1,230,327	\$1,267,236
Building-Related											
Event Related Concessions (Gross)		\$265,000	\$272,950	\$281,139	\$289,573	\$298,260	\$307,208	\$316,424	\$325,917	\$335,694	\$345,765
Merchandising and Novelties (Gross)		\$97,500	\$100,425	\$103,438	\$106,541	\$109,737	\$113,029	\$116,420	\$119,913	\$123,510	\$127,215
Other F&B - Daily use (Gross)		\$73,800	\$76,014	\$78,294	\$80,643	\$83,063	\$85,554	\$88,121	\$90,765	\$93,488	\$96,292
Advertising		\$54,750	\$56,393	\$58,084	\$59,827	\$61,622	\$63,470	\$65,374	\$67,336	\$69,356	\$71,436
Naming Rights		\$50,000	\$51,500	\$53,045	\$54,636	\$56,275	\$57,964	\$59,703	\$61,494	\$63,339	\$65,239
Lease Space Net Rent		\$199,500	\$199,500	\$199,500	\$199,500	\$199,500	\$231,275	\$231,275	\$231,275	\$231,275	\$231,275
Total Building Related		\$740,550	\$756,782	\$773,500	\$790,720	\$808,457	\$858,500	\$877,317	\$896,698	\$916,661	\$937,223
Total Revenue		\$1,711,781	\$1,757,150	\$1,803,879	\$1,852,011	\$1,901,586	\$1,984,424	\$2,037,018	\$2,091,190	\$2,146,988	\$2,204,459
Direct Expenses (cost of sales incl. ticketing service)		(\$307,408)	(\$316,630)	(\$326,129)	(\$335,912)	(\$345,990)	(\$356,370)	(\$367,061)	(\$378,072)	(\$389,415)	(\$401,097)
Gross Margin		\$1,404,374	\$1,440,520	\$1,477,751	\$1,516,098	\$1,555,596	\$1,628,054	\$1,669,957	\$1,713,118	\$1,757,573	\$1,803,362
<b>Facility Expenses</b>											
Payroll (Labour)		(\$651,630)	(\$671,179)	(\$691,314)	(\$712,054)	(\$733,415)	(\$755,418)	(\$778,080)	(\$801,423)	(\$825,465)	(\$850,229)
Utilities		(\$334,625)	(\$344,664)	(\$355,004)	(\$365,654)	(\$376,623)	(\$387,922)	(\$399,560)	(\$411,547)	(\$423,893)	(\$436,610)
Operating, Maintenance and Repair (incl. purchased supplies)		(\$209,600)	(\$215,888)	(\$222,365)	(\$229,036)	(\$235,907)	(\$242,984)	(\$250,273)	(\$257,782)	(\$265,515)	(\$273,480)
Marketing		(\$20,000)	(\$20,600)	(\$21,218)	(\$21,855)	(\$22,510)	(\$23,185)	(\$23,881)	(\$24,597)	(\$25,335)	(\$26,095)
Insurance		(\$50,000)	(\$51,500)	(\$53,045)	(\$54,636)	(\$56,275)	(\$57,964)	(\$59,703)	(\$61,494)	(\$63,339)	(\$65,239)
Winterization of Stands and Set-Up/Take-Down of Bubble		(\$110,000)	(\$113,300)	(\$116,699)	(\$120,200)	(\$123,806)	(\$127,520)	(\$131,346)	(\$135,286)	(\$139,345)	(\$143,525)
Professional Development and Travel		(\$20,000)	(\$20,600)	(\$21,218)	(\$21,855)	(\$22,510)	(\$23,185)	(\$23,881)	(\$24,597)	(\$25,335)	(\$26,095)
Realty Taxes		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total Expenses (Excl. Management Fee and Capital Reserve)		(\$1,395,855)	(\$1,437,731)	(\$1,480,863)	(\$1,525,288)	(\$1,571,047)	(\$1,618,179)	(\$1,666,724)	(\$1,716,726)	(\$1,768,227)	(\$1,821,274)
<b>Net Income (NOI) Before Management Fee and Capital Reserve</b>		\$8,519	\$2,789	(\$3,112)	(\$9,190)	(\$15,451)	\$9,876	\$3,234	(\$3,608)	(\$10,654)	(\$17,912)
<b>Management Fee</b>		(\$200,000)	(\$206,000)	(\$212,180)	(\$218,545)	(\$225,102)	(\$231,855)	(\$238,810)	(\$245,975)	(\$253,354)	(\$260,955)
<b>Capital Reserve</b>		(\$280,000)	(\$280,000)	(\$280,000)	(\$280,000)	(\$280,000)	(\$280,000)	(\$280,000)	(\$280,000)	(\$280,000)	(\$280,000)
<b>NOI after Capital Reserve</b>		(\$471,481)	(\$483,211)	(\$495,292)	(\$507,736)	(\$520,553)	(\$501,979)	(\$515,577)	(\$529,582)	(\$544,008)	(\$558,867)

PV of Operating Income:	Discount Rate
NOI before Fees and Capital Reserve	7% (\$31,268)
NOI after Management Fee and Capital Reserve	7% (\$5,663,924)

# Halifax Regional Municipality

## Stadium - Indicative Financial Performance

### 20 Year Operating Revenue/Cost Projections

**Scenario 1**

Assumes Normalized Revenues/Costs (no ramp-up)

		Year 11	Year 12	Year 13	Year 14	Year 15	Year 16	Year 17	Year 18	Year 19	Year 20
<i>Escalation (p.a.)</i>	3%	1.34	1.38	1.43	1.47	1.51	1.56	1.60	1.65	1.70	1.75
<b>Revenue</b>											
Field Revenue											
Field Revenue - Spring- Fall Prime time		\$297,341	\$306,262	\$315,450	\$324,913	\$334,660	\$344,700	\$355,041	\$365,693	\$376,663	\$387,963
Field Revenue - Spring- Fall Non-Prime time		\$74,184	\$76,410	\$78,702	\$81,063	\$83,495	\$86,000	\$88,580	\$91,237	\$93,974	\$96,794
Field Revenue - Winter Bubble - Prime time		\$195,943	\$201,821	\$207,876	\$214,112	\$220,536	\$227,152	\$233,966	\$240,985	\$248,215	\$255,661
Field Revenue - Winter Bubble - Non-Prime time		\$136,139	\$140,223	\$144,430	\$148,762	\$153,225	\$157,822	\$162,557	\$167,433	\$172,456	\$177,630
Annual Ticketed Events		\$601,646	\$619,696	\$638,286	\$657,435	\$677,158	\$697,473	\$718,397	\$739,949	\$762,147	\$785,012
<b>Total Field Related Revenue</b>		<b>\$1,305,254</b>	<b>\$1,344,411</b>	<b>\$1,384,744</b>	<b>\$1,426,286</b>	<b>\$1,469,074</b>	<b>\$1,513,147</b>	<b>\$1,558,541</b>	<b>\$1,605,297</b>	<b>\$1,653,456</b>	<b>\$1,703,060</b>
Building-Related											
Event Related Concessions (Gross)		\$356,138	\$366,822	\$377,827	\$389,161	\$400,836	\$412,861	\$425,247	\$438,005	\$451,145	\$464,679
Merchandising and Novelties (Gross)		\$131,032	\$134,963	\$139,012	\$143,182	\$147,477	\$151,902	\$156,459	\$161,153	\$165,987	\$170,967
Other F&B - Daily use (Gross)		\$99,181	\$102,156	\$105,221	\$108,378	\$111,629	\$114,978	\$118,427	\$121,980	\$125,640	\$129,409
Advertising		\$73,579	\$75,787	\$78,060	\$80,402	\$82,814	\$85,299	\$87,858	\$90,493	\$93,208	\$96,004
Naming Rights		\$67,196	\$69,212	\$71,288	\$73,427	\$75,629	\$77,898	\$80,235	\$82,642	\$85,122	\$87,675
Lease Space Net Rent		\$268,111	\$268,111	\$268,111	\$268,111	\$268,111	\$310,814	\$310,814	\$310,814	\$310,814	\$310,814
<b>Total Building Related</b>		<b>\$995,237</b>	<b>\$1,017,051</b>	<b>\$1,039,519</b>	<b>\$1,062,661</b>	<b>\$1,086,498</b>	<b>\$1,153,753</b>	<b>\$1,179,041</b>	<b>\$1,205,088</b>	<b>\$1,231,916</b>	<b>\$1,259,549</b>
<b>Total Revenue</b>		<b>\$2,300,491</b>	<b>\$2,361,462</b>	<b>\$2,424,263</b>	<b>\$2,488,947</b>	<b>\$2,555,572</b>	<b>\$2,666,899</b>	<b>\$2,737,582</b>	<b>\$2,810,385</b>	<b>\$2,885,372</b>	<b>\$2,962,609</b>
Direct Expenses (cost of sales incl. ticketing service)		(\$413,130)	(\$425,524)	(\$438,290)	(\$451,438)	(\$464,981)	(\$478,931)	(\$493,299)	(\$508,098)	(\$523,341)	(\$539,041)
<b>Gross Margin</b>		<b>\$1,887,361</b>	<b>\$1,935,938</b>	<b>\$1,985,973</b>	<b>\$2,037,509</b>	<b>\$2,090,591</b>	<b>\$2,187,969</b>	<b>\$2,244,283</b>	<b>\$2,302,287</b>	<b>\$2,362,031</b>	<b>\$2,423,568</b>
<b>Facility Expenses</b>											
Payroll (Labour)		(\$875,736)	(\$902,008)	(\$929,069)	(\$956,941)	(\$985,649)	(\$1,015,218)	(\$1,045,675)	(\$1,077,045)	(\$1,109,356)	(\$1,142,637)
Utilities		(\$449,708)	(\$463,199)	(\$477,095)	(\$491,408)	(\$506,150)	(\$521,335)	(\$536,975)	(\$553,084)	(\$569,677)	(\$586,767)
Operating, Maintenance and Repair (incl. purchased supplies)		(\$281,685)	(\$290,135)	(\$298,839)	(\$307,805)	(\$317,039)	(\$326,550)	(\$336,346)	(\$346,437)	(\$356,830)	(\$367,535)
Marketing		(\$26,878)	(\$27,685)	(\$28,515)	(\$29,371)	(\$30,252)	(\$31,159)	(\$32,094)	(\$33,057)	(\$34,049)	(\$35,070)
Insurance		(\$67,196)	(\$69,212)	(\$71,288)	(\$73,427)	(\$75,629)	(\$77,898)	(\$80,235)	(\$82,642)	(\$85,122)	(\$87,675)
Winterization of Stands and Set-Up/Take-Down of Bubble		(\$147,831)	(\$152,266)	(\$156,834)	(\$161,539)	(\$166,385)	(\$171,376)	(\$176,518)	(\$181,813)	(\$187,268)	(\$192,886)
Professional Development and Travel		(\$26,878)	(\$27,685)	(\$28,515)	(\$29,371)	(\$30,252)	(\$31,159)	(\$32,094)	(\$33,057)	(\$34,049)	(\$35,070)
Realty Taxes		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Expenses (Excl. Management Fee and Capital Reserve)</b>		<b>(\$1,875,912)</b>	<b>(\$1,932,190)</b>	<b>(\$1,990,155)</b>	<b>(\$2,049,860)</b>	<b>(\$2,111,356)</b>	<b>(\$2,174,697)</b>	<b>(\$2,239,938)</b>	<b>(\$2,307,136)</b>	<b>(\$2,376,350)</b>	<b>(\$2,447,640)</b>
<b>Net Income (NOI) Before Management Fee and Capital Reserve</b>		<b>\$11,448</b>	<b>\$3,749</b>	<b>(\$4,182)</b>	<b>(\$12,351)</b>	<b>(\$20,765)</b>	<b>\$13,272</b>	<b>\$4,346</b>	<b>(\$4,848)</b>	<b>(\$14,318)</b>	<b>(\$24,072)</b>
<b>Management Fee</b>		<b>(\$268,783)</b>	<b>(\$276,847)</b>	<b>(\$285,152)</b>	<b>(\$293,707)</b>	<b>(\$302,518)</b>	<b>(\$311,593)</b>	<b>(\$320,941)</b>	<b>(\$330,570)</b>	<b>(\$340,487)</b>	<b>(\$350,701)</b>
<b>Capital Reserve</b>		<b>(\$280,000)</b>	<b>(\$280,000)</b>	<b>(\$280,000)</b>	<b>(\$280,000)</b>	<b>(\$280,000)</b>	<b>(\$280,000)</b>	<b>(\$280,000)</b>	<b>(\$280,000)</b>	<b>(\$280,000)</b>	<b>(\$280,000)</b>
<b>NOI after Capital Reserve</b>		<b>(\$537,335)</b>	<b>(\$553,098)</b>	<b>(\$569,334)</b>	<b>(\$586,058)</b>	<b>(\$603,283)</b>	<b>(\$578,322)</b>	<b>(\$596,596)</b>	<b>(\$615,418)</b>	<b>(\$634,805)</b>	<b>(\$654,773)</b>

**Halifax Stadium Business Plan**  
**Indicative Financial Performance:**  
**Scenario 2**

---

This page intentionally left blank

Halifax Regional Municipality  
Stadium - Indicative Financial Performance  
Field Programming By Month

Spring-Fall

Scenario 2

											Premium Rate (2011 Rate +25%)	Annual Revenue	
Activity		April	May	June	July	August	September	October	November	Total			
Prime Time		Mon-Friday, 5-11pm & Sat-Sun, 8-11pm				60 hrs per week							
	Total Allocation %	Total Allocation Distributed Evenly by Month - Note Individual Sports Field Use Demand Profiles will vary											
Soccer	55%	86	119	125	125	119	106	79	66	825	\$147.50		
Football (All levels, Flag, Tackle)	20%	31	43	46	46	43	38	29	24	300	\$147.50		
Lacrosse	5%	8	11	11	11	11	10	7	6	75	\$147.50		
Field Hockey	5%	8	11	11	11	11	10	7	6	75	\$147.50		
Rugby	5%	8	11	11	11	11	10	7	6	75	\$147.50		
Other (Ultimate, Corporate Use)	10%	16	22	23	23	22	19	14	12	150	\$147.50		
School Board (principally non-Prime)	0%	0	0	0	0	0	0	0	0	0	\$147.50		
Total	100%	156	216	228	228	216	192	144	120	1,500	\$147.50	\$221,250.00	
% of Prime Time		65%	90%	95%	95%	90%	80%	60%	50%			Risk: 10% fee loss for lost rental during event set-up/take-down	
Total Prime Available		240	240	240	240	240	240	240	240				
Non-Prime Time		Mon-Friday, 8-5pm, 11-12pm & Sat-Sun, 11-12pm				52 hrs per week							
% Use		38%	38%	29%	0%	0%	29%	48%	48%	19%			
Daily hours booked		4	4	3	0	0	3	5	5				
Monthly		80	80	60	0	0	60	100	100	480	\$115	\$55,200	

B. Winter Bubbling - Assume 4 Month Operation

4 month Operation	Hours Available	Price per 1/3 Field	% Rented as 1/3 Field	Price Per Full Field	% Rented as Full Field	Utilization	Revenue	Risk Discount	Business Plan Base Case
Prime Time	960	\$150.00	70%	\$300	30%	75%	\$291,600	0%	\$291,600
Non-Prime Time	832	\$125.00	45%	\$240	55%	45%	\$112,601	0%	\$112,600

Note: Rate is blended youth and adult rate

**Halifax Regional Municipality**  
**Stadium - Indicative Financial Performance**  
**Concession and Building Revenues**

**Scenario** **2**

**Note: For Ticketed Events occurring Annually Only**

Event Concession Revenues/Costs	persons	Average Per Capita Expenditure	Cost of Sales	
Participants (Events only)	5,000	\$5.00		\$25,000.00
Spectators	60,000	\$4.00		\$240,000.00
Gross Sales				\$265,000.00
Cost of Sales	65%			(\$172,250.00)
Net Sales				\$92,750.00
Merchandising Sales - from Ticket Events Only	19,500	\$5.00	65.00%	\$34,125.00
Note: vending and other F&B from daily participants (field rentals)				
	hours	Participants (assume 2 hour rentals)		
Prime Time only	2,460	36,900	\$2.00	65.00%
Percent of Net Accruing to Facility (Scenario 2 only)	25.00%			\$38,176.25

Advertising				
Naming Rights by Facility Component				
Track Boards	\$30,000.00	15 boards @ \$2,000		Limited without Franchise
Major Event (Game) Sponsorship		Pursue with Corporate and Government Sector - assume no sponsorship to cover facility costs of event and ticketing		
Major Game Board Advertising (occasional only)	\$75,000.00	30 boards (half field)	\$2,500	e.g. National Team Soccer
Discount by 2/3rd to reflect infrequency per year	\$24,750.00			
Facility Naming Rights	\$100,000.00	per annum on 10 Year escalated basis		
Total	\$154,750.00			
Advertising Marketing Cost	0.00%	covered in expenses		
Net	\$154,750.00			

Tenant Office/Commercial Rent (offices, retail and fitness centre)			
Gross Leasable Area (GLA)	19,000 sq. ft.	20,000	sq.ft. gross
Lease Rate (incl. share of building utility and maintenance costs)	\$17.50 /sq. ft.	Space varies in quality due to fenestration of building exterior only	
Occupancy	70%		
Net Rent	\$232,750.00 p.a.		

Note: Leasable space is 50% of building useable space. Balance is for building function systems (common area, washrooms sized for build-out of grandstand (expansion), change rooms, management offices, loading, housekeeping and storage.

**Halifax Regional Municipality**  
**Stadium - Indicative Financial Performance**  
**Concession and Building Revenues**

**Scenario** **2**

**Note: For Ticketed Events occurring Annually Only**

					Gross Revenue
<b>Example:</b>					
<i>CSA National Team Game</i>					
		Discount - Halifax	% seating	Average Attendance	
Ticket Ranges (BMO comparator - Men's Senior)					\$0.00
Club seats	75.00	56.25	20.00%		\$0.00
Mid Range	50.00	37.50	50.00%		\$0.00
Low Range	30.00	22.50	30.00%		
		Av. Price	\$36.75	8,000	\$294,000.00
Ticketing service rebate	5.0%				(\$14,700.00)
Net					\$279,300.00
Discount: Game Frequency	1 per	year		0%	\$0.00
<i>Uteck Bowl:</i>					
		\$37.00	20.00%		
		\$27.00	40.00%		
		\$17.00	30.00%		
		\$10.00	10.00%		
		Av. Price	\$24.30	7,500	\$182,250.00
Ticketing service rebate	5%				(\$9,112.50)
Discount: Game Frequency	1 per 2 years		50% discount		\$86,568.75
<i>Loney Bowl</i>					
			\$12.00	4,000.00	\$48,000.00
Discount: Game Frequency	1 per year		0% discount		\$0.00
No ticketing service - on-site and on-line					

**Major National and International Tournament Events - FIFA World Cups, National/International Athletics Games (if accommodated)**

1. All such events are at risk owing to bid process
2. Per the assumptions of the business plans for typical showcase events, staging costs and gross receipts from ticketed venues assumed to be break-even
3. Financial Model excludes one-off event staging expenses and revenues.
4. Very infrequent events such as Vanier Cup are excluded - these events if attracted will significantly assist gross revenues in those years
5. A larger number of provincial and regional events are possible and expected but are likely not ticketed.

**Entertainment Event**

Assume 1 per	3 years		
Base rent charged plus event facility costs (building not placed at financial risk for success of event)	\$10,000.00 per day	3 days	\$30,000.00
Discount for frequency	\$10,000.00 p.a.		

Halifax Regional Municipality

Stadium - Indicative Financial Performance

Expenses

City Own/Third Party Operate	Scenario	2
------------------------------	----------	---

Expense Category	Description	Itemization of Cost					
<b>1. Annual Salary and Wage Costs</b>	Facility Manager	FTE	1	\$100,000	plus	20.00%	Benefits \$120,000.00
	Assistant Manager/Administrator		1	\$65,000	plus	20.00%	Benefits \$78,000.00
	Facility Operations and Maintenance Supervisor		1	\$40,000	plus	20.00%	Benefits \$48,000.00
	Facility Maintenance Staff		3	\$40,000	plus	20.00%	Benefits \$144,000.00
	Event Services/Sales and Marketing		1	\$45,000	plus	20.00%	Benefits \$54,000.00
	<b>Sub-Total</b>		<b>7</b>				<b>\$444,000</b>
	PT Event Staff (Major Events)	Average 50 staff		\$11.00	/hr	20.00%	Benefits \$165,000.00
	Event Concession/Food and Beverage Staff	Included in cost of sales					
	Payroll-related Expenses					7.00%	\$42,630.00
	<b>Total Staffing Costs</b>						<b>\$651,630</b>
<b>Operational Expenses</b>	2. Utilities	Building (12 month operation)	\$3.00	per square foot	40,000	sq.ft.	\$120,000.00
		Flood Lighting (International TV Standard to 1400-1700 Lux per FIFA requirements) / community standards lower	\$125.00	Blended Average			\$114,625.00
		Other - heat, water and services, lighting	\$2.50				\$100,000.00
	<b>Total Utilities</b>						<b>\$334,625</b>
<b>Stadium Operating, Maintenance and Repair</b>	3a. Administration (Clothing, office supplies and equipment, communications)						\$10,000.00
	3c. Repair and Maintenance incl. field	\$3.50 per hour for field plus other					\$30,600.00
	3d. Janitorial contract and supplies	Washrooms, corridors, change rooms and offices	\$2,000	per month	plus	\$30,000	\$54,000.00
	3e. Grounds maintenance and Snow Removal	Supplies and equipment costs, City snow removal assumed					\$10,000.00
	3f. Event costs (excluding PT labour)	Allocation based on potential event schedule					\$100,000.00
	3f. Waste Management	Supplement to City Services as needed					\$5,000.00
	<b>Sub-Total Item 3</b>						<b>\$209,600</b>
4 Marketing Costs	Assumed bulk of event attraction, advertising and promotion undertaken by other agencies of City and Province		\$20,000	per year			\$20,000
	Based on comparables (BMO field) and adjusted for expected average attendance; Option for City to cover facility under City Policy; Sales and marketing salaries identified under Payroll costs		\$0	per year			\$0
			\$0.00	per square foot			\$0.00
							\$10,000.00
							\$20,000.00
	includes rental of machinery to haul and erect; plus storage		\$50,000.00	per set-up/take-down			\$100,000.00
	<b>Sub-Total Other Expenses</b>						<b>\$150,000</b>
<b>Sub-Total Operational Expenses Before Capital Reserve and Management Fee</b>							<b>\$1,345,855.00</b>
10. Management Fee							\$200,000.00
	11. Capital Reserve Fund						\$280,000
<b>Total Annual Expenses</b>							<b>\$1,825,855</b>



# Halifax Regional Municipality

## Stadium - Indicative Financial Performance

### 20 Year Operating Revenue/Cost Projections

**Scenario 2**

Assumes Normalized Revenues/Costs (no ramp-up)

		Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
<i>Escalation (p.a.)</i>	3%	1.00	1.03	1.06	1.09	1.13	1.16	1.19	1.23	1.27	1.30
<b>Revenue</b>											
Field Revenue											
Field Revenue - Spring- Fall Prime time		\$221,250	\$227,888	\$234,724	\$241,766	\$249,019	\$256,489	\$264,184	\$272,110	\$280,273	\$288,681
Field Revenue - Spring- Fall Non-Prime time		\$55,200	\$56,856	\$58,562	\$60,319	\$62,128	\$63,992	\$65,912	\$67,889	\$69,926	\$72,023
Field Revenue - Winter Bubble - Prime time		\$291,600	\$300,348	\$309,358	\$318,639	\$328,198	\$338,044	\$348,186	\$358,631	\$369,390	\$380,472
Field Revenue - Winter Bubble - Non-Prime time		\$112,600	\$115,978	\$119,457	\$123,041	\$126,732	\$130,534	\$134,450	\$138,484	\$142,638	\$146,917
Annual Ticketed Events		\$447,681	\$461,112	\$474,945	\$489,193	\$503,869	\$518,985	\$534,555	\$550,591	\$567,109	\$584,122
<b>Total Field Related Revenue</b>		<b>\$1,128,331</b>	<b>\$1,162,181</b>	<b>\$1,197,047</b>	<b>\$1,232,958</b>	<b>\$1,269,947</b>	<b>\$1,308,045</b>	<b>\$1,347,287</b>	<b>\$1,387,705</b>	<b>\$1,429,336</b>	<b>\$1,472,216</b>
Building-Related											
Event Related Concessions (% of Gross)		\$23,188	\$23,883	\$24,600	\$25,338	\$26,098	\$26,881	\$27,687	\$28,518	\$29,373	\$30,254
Merchandising and Novelties (% of Gross)		\$8,531	\$8,787	\$9,051	\$9,322	\$9,602	\$9,890	\$10,187	\$10,492	\$10,807	\$11,131
Other F&B - Daily use (Gross) (% of Gross)		\$6,458	\$6,651	\$6,851	\$7,056	\$7,268	\$7,486	\$7,711	\$7,942	\$8,180	\$8,426
Advertising		\$54,750	\$56,393	\$58,084	\$59,827	\$61,622	\$63,470	\$65,374	\$67,336	\$69,356	\$71,436
Naming Rights		\$100,000	\$103,000	\$106,090	\$109,273	\$112,551	\$115,927	\$119,405	\$122,987	\$126,677	\$130,477
Lease Space Net Rent		\$232,750	\$232,750	\$232,750	\$232,750	\$232,750	\$269,821	\$269,821	\$269,821	\$269,821	\$269,821
<b>Total Building Related</b>		<b>\$425,676</b>	<b>\$431,464</b>	<b>\$437,425</b>	<b>\$443,566</b>	<b>\$449,890</b>	<b>\$493,475</b>	<b>\$500,185</b>	<b>\$507,096</b>	<b>\$514,214</b>	<b>\$521,546</b>
<b>Total Revenue</b>		<b>\$1,554,008</b>	<b>\$1,593,645</b>	<b>\$1,634,472</b>	<b>\$1,676,524</b>	<b>\$1,719,837</b>	<b>\$1,801,521</b>	<b>\$1,847,472</b>	<b>\$1,894,801</b>	<b>\$1,943,551</b>	<b>\$1,993,762</b>
Direct Expenses (ticketing service)		(\$23,813)	(\$24,527)	(\$25,263)	(\$26,021)	(\$26,801)	(\$27,605)	(\$28,433)	(\$29,286)	(\$30,165)	(\$31,070)
<b>Gross Margin</b>		<b>\$1,530,195</b>	<b>\$1,569,118</b>	<b>\$1,609,209</b>	<b>\$1,650,503</b>	<b>\$1,693,036</b>	<b>\$1,773,915</b>	<b>\$1,819,038</b>	<b>\$1,865,515</b>	<b>\$1,913,386</b>	<b>\$1,962,692</b>
<b>Facility Expenses</b>											
Payroll (Labour)		(\$651,630)	(\$671,179)	(\$691,314)	(\$712,054)	(\$733,415)	(\$755,418)	(\$778,080)	(\$801,423)	(\$825,465)	(\$850,229)
Utilities		(\$334,625)	(\$344,664)	(\$355,004)	(\$365,654)	(\$376,623)	(\$387,922)	(\$399,560)	(\$411,547)	(\$423,893)	(\$436,610)
Operating, Maintenance and Repair (incl. purchased supplies)		(\$209,600)	(\$215,888)	(\$222,365)	(\$229,036)	(\$235,907)	(\$242,984)	(\$250,273)	(\$257,782)	(\$265,515)	(\$273,480)
Marketing		(\$20,000)	(\$20,600)	(\$21,218)	(\$21,855)	(\$22,510)	(\$23,185)	(\$23,881)	(\$24,597)	(\$25,335)	(\$26,095)
Insurance		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Winterization of Stands and Set-Up/Take-Down of Bubble		(\$110,000)	(\$113,300)	(\$116,699)	(\$120,200)	(\$123,806)	(\$127,520)	(\$131,346)	(\$135,286)	(\$139,345)	(\$143,525)
Professional Development and Travel		(\$20,000)	(\$20,600)	(\$21,218)	(\$21,855)	(\$22,510)	(\$23,185)	(\$23,881)	(\$24,597)	(\$25,335)	(\$26,095)
Realty Taxes		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Expenses (Excl. Management Fee and Capital Reserve)</b>		<b>(\$1,345,855)</b>	<b>(\$1,386,231)</b>	<b>(\$1,427,818)</b>	<b>(\$1,470,652)</b>	<b>(\$1,514,772)</b>	<b>(\$1,560,215)</b>	<b>(\$1,607,021)</b>	<b>(\$1,655,232)</b>	<b>(\$1,704,889)</b>	<b>(\$1,756,036)</b>
<b>Net Income (NOI) Before Management Fee and Capital Reserve</b>		<b>\$184,340</b>	<b>\$182,888</b>	<b>\$181,392</b>	<b>\$179,851</b>	<b>\$178,264</b>	<b>\$213,701</b>	<b>\$212,017</b>	<b>\$210,283</b>	<b>\$208,497</b>	<b>\$206,657</b>
<b>Management Fee</b>		<b>(\$200,000)</b>	<b>(\$206,000)</b>	<b>(\$212,180)</b>	<b>(\$218,545)</b>	<b>(\$225,102)</b>	<b>(\$231,855)</b>	<b>(\$238,810)</b>	<b>(\$245,975)</b>	<b>(\$253,354)</b>	<b>(\$260,955)</b>
<b>Capital Reserve</b>		<b>(\$280,000)</b>	<b>(\$280,000)</b>	<b>(\$280,000)</b>	<b>(\$280,000)</b>	<b>(\$280,000)</b>	<b>(\$280,000)</b>	<b>(\$280,000)</b>	<b>(\$280,000)</b>	<b>(\$280,000)</b>	<b>(\$280,000)</b>
<b>NOI after Capital Reserve</b>		<b>(\$295,660)</b>	<b>(\$303,112)</b>	<b>(\$310,788)</b>	<b>(\$318,694)</b>	<b>(\$326,838)</b>	<b>(\$298,154)</b>	<b>(\$306,793)</b>	<b>(\$315,692)</b>	<b>(\$324,857)</b>	<b>(\$334,298)</b>

<b>PV of Operating Income:</b>	<b>Discount Rate</b>
<b>NOI before Fees and Capital Reserve</b>	<b>7% \$2,288,583</b>
<b>NOI after Management Fee and Capital Reserve</b>	<b>7% (\$3,344,074)</b>

# Halifax Regional Municipality

## Stadium - Indicative Financial Performance

### 20 Year Operating Revenue/Cost Projections

**Scenario 2**

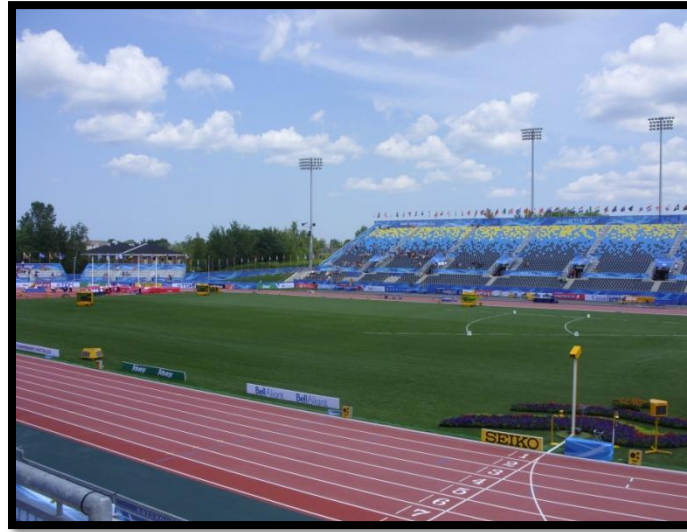
Assumes Normalized Revenues/Costs (no ramp-up)

		Year 11	Year 12	Year 13	Year 14	Year 15	Year 16	Year 17	Year 18	Year 19	Year 20
<i>Escalation (p.a.)</i>	3%	1.34	1.38	1.43	1.47	1.51	1.56	1.60	1.65	1.70	1.75
<b>Revenue</b>											
Field Revenue											
Field Revenue - Spring- Fall Prime time		\$297,341	\$306,262	\$315,450	\$324,913	\$334,660	\$344,700	\$355,041	\$365,693	\$376,663	\$387,963
Field Revenue - Spring- Fall Non-Prime time		\$74,184	\$76,410	\$78,702	\$81,063	\$83,495	\$86,000	\$88,580	\$91,237	\$93,974	\$96,794
Field Revenue - Winter Bubble - Prime time		\$391,886	\$403,643	\$415,752	\$428,224	\$441,071	\$454,303	\$467,932	\$481,970	\$496,429	\$511,322
Field Revenue - Winter Bubble - Non-Prime time		\$151,325	\$155,865	\$160,541	\$165,357	\$170,318	\$175,427	\$180,690	\$186,111	\$191,694	\$197,445
Annual Ticketed Events		\$601,646	\$619,696	\$638,286	\$657,435	\$677,158	\$697,473	\$718,397	\$739,949	\$762,147	\$785,012
<b>Total Field Related Revenue</b>		<b>\$1,516,383</b>	<b>\$1,561,874</b>	<b>\$1,608,731</b>	<b>\$1,656,992</b>	<b>\$1,706,702</b>	<b>\$1,757,903</b>	<b>\$1,810,640</b>	<b>\$1,864,960</b>	<b>\$1,920,908</b>	<b>\$1,978,536</b>
Building-Related											
Event Related Concessions (% of Gross)		\$31,162	\$32,097	\$33,060	\$34,052	\$35,073	\$36,125	\$37,209	\$38,325	\$39,475	\$40,659
Merchandising and Novelties (% of Gross)		\$11,465	\$11,809	\$12,164	\$12,528	\$12,904	\$13,291	\$13,690	\$14,101	\$14,524	\$14,960
Other F&B - Daily use (Gross) (% of Gross)		\$8,678	\$8,939	\$9,207	\$9,483	\$9,768	\$10,061	\$10,362	\$10,673	\$10,993	\$11,323
Advertising		\$73,579	\$75,787	\$78,060	\$80,402	\$82,814	\$85,299	\$87,858	\$90,493	\$93,208	\$96,004
Naming Rights		\$134,392	\$138,423	\$142,576	\$146,853	\$151,259	\$155,797	\$160,471	\$165,285	\$170,243	\$175,351
Lease Space Net Rent		\$312,797	\$312,797	\$312,797	\$312,797	\$312,797	\$362,617	\$362,617	\$362,617	\$362,617	\$362,617
<b>Total Building Related</b>		<b>\$572,073</b>	<b>\$579,852</b>	<b>\$587,863</b>	<b>\$596,115</b>	<b>\$604,615</b>	<b>\$663,190</b>	<b>\$672,207</b>	<b>\$681,495</b>	<b>\$691,061</b>	<b>\$700,914</b>
<b>Total Revenue</b>		<b>\$2,088,456</b>	<b>\$2,141,726</b>	<b>\$2,196,594</b>	<b>\$2,253,108</b>	<b>\$2,311,317</b>	<b>\$2,421,093</b>	<b>\$2,482,847</b>	<b>\$2,546,454</b>	<b>\$2,611,969</b>	<b>\$2,679,450</b>
Direct Expenses (ticketing service)		(\$32,002)	(\$32,962)	(\$33,951)	(\$34,969)	(\$36,019)	(\$37,099)	(\$38,212)	(\$39,358)	(\$40,539)	(\$41,755)
<b>Gross Margin</b>		<b>\$2,056,454</b>	<b>\$2,108,764</b>	<b>\$2,162,643</b>	<b>\$2,218,138</b>	<b>\$2,275,299</b>	<b>\$2,383,994</b>	<b>\$2,444,635</b>	<b>\$2,507,096</b>	<b>\$2,571,430</b>	<b>\$2,637,695</b>
<b>Facility Expenses</b>											
Payroll (Labour)		(\$875,736)	(\$902,008)	(\$929,069)	(\$956,941)	(\$985,649)	(\$1,015,218)	(\$1,045,675)	(\$1,077,045)	(\$1,109,356)	(\$1,142,637)
Utilities		(\$449,708)	(\$463,199)	(\$477,095)	(\$491,408)	(\$506,150)	(\$521,335)	(\$536,975)	(\$553,084)	(\$569,677)	(\$586,767)
Operating, Maintenance and Repair (incl. purchased supplies)		(\$281,685)	(\$290,135)	(\$298,839)	(\$307,805)	(\$317,039)	(\$326,550)	(\$336,346)	(\$346,437)	(\$356,830)	(\$367,535)
Marketing		(\$26,878)	(\$27,685)	(\$28,515)	(\$29,371)	(\$30,252)	(\$31,159)	(\$32,094)	(\$33,057)	(\$34,049)	(\$35,070)
Insurance		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Winterization of Stands and Set-Up/Take-Down of Bubble		(\$147,831)	(\$152,266)	(\$156,834)	(\$161,539)	(\$166,385)	(\$171,376)	(\$176,518)	(\$181,813)	(\$187,268)	(\$192,886)
Professional Development and Travel		(\$26,878)	(\$27,685)	(\$28,515)	(\$29,371)	(\$30,252)	(\$31,159)	(\$32,094)	(\$33,057)	(\$34,049)	(\$35,070)
Realty Taxes		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Expenses (Excl. Management Fee and Capital Reserve)</b>		<b>(\$1,808,717)</b>	<b>(\$1,862,978)</b>	<b>(\$1,918,867)</b>	<b>(\$1,976,433)</b>	<b>(\$2,035,726)</b>	<b>(\$2,096,798)</b>	<b>(\$2,159,702)</b>	<b>(\$2,224,493)</b>	<b>(\$2,291,228)</b>	<b>(\$2,359,965)</b>
<b>Net Income (NOI) Before Management Fee and Capital Reserve</b>		<b>\$247,738</b>	<b>\$245,786</b>	<b>\$243,775</b>	<b>\$241,705</b>	<b>\$239,572</b>	<b>\$287,196</b>	<b>\$284,933</b>	<b>\$282,603</b>	<b>\$280,202</b>	<b>\$277,730</b>
<b>Management Fee</b>		<b>(\$268,783)</b>	<b>(\$276,847)</b>	<b>(\$285,152)</b>	<b>(\$293,707)</b>	<b>(\$302,518)</b>	<b>(\$311,593)</b>	<b>(\$320,941)</b>	<b>(\$330,570)</b>	<b>(\$340,487)</b>	<b>(\$350,701)</b>
<b>Capital Reserve</b>		<b>(\$280,000)</b>	<b>(\$280,000)</b>	<b>(\$280,000)</b>	<b>(\$280,000)</b>	<b>(\$280,000)</b>	<b>(\$280,000)</b>	<b>(\$280,000)</b>	<b>(\$280,000)</b>	<b>(\$280,000)</b>	<b>(\$280,000)</b>
<b>NOI after Capital Reserve</b>		<b>(\$301,046)</b>	<b>(\$311,061)</b>	<b>(\$321,377)</b>	<b>(\$332,002)</b>	<b>(\$342,946)</b>	<b>(\$304,398)</b>	<b>(\$316,008)</b>	<b>(\$327,967)</b>	<b>(\$340,284)</b>	<b>(\$352,972)</b>



# Phase 1 Stadium Analysis: Detailed Stadium Case Studies

Halifax Regional Municipality



<b>Year of Opening:</b> 2010	<b>Capital Cost:</b> \$20 million Excl. land	<b>Capacity:</b> 10,000 fixed seats (expandable to 20,725)	<b>Building Footprint:</b> 30,000 m2	<b>Facility Operator:</b> City of Moncton and University of Moncton	<b>Key Uses:</b> Track and field, football, soccer, major events hosting
---------------------------------	--	---	---	--	---

### Background and Facility Description

The Moncton Stadium is a track-and-field stadium recently constructed to host the 2010 International Association of Athletics Federations (IAAF) World Junior Championships. In addition to serving as a legacy project to help grow athletics in Atlantic Canada, the facility was designed with the ability to accommodate soccer and football matches, as well as outdoor concerts. The stadium is located on the campus of the University of Moncton, adjacent to the University's indoor sports facilities. The project received capital funding from all three levels of government and from the University. The facility is currently being jointly managed by the City of Moncton and the University of Moncton.

### Anchor Tenants and Key Uses

- No anchor tenant at the moment
- Men's and women's university soccer teams

- University track and field team
- University does not have a football team but there has been discussion of starting one. The viability of a new team is currently under consideration by the University.
- Regional athletic associations have access to 8-lane 400m track which surrounds the field through a facility use agreement.
- Several events have been attracted to the facility, including CFL exhibition games (Touchdown Atlantic), the Uteck Bowl, and the Canadian Track and Field Championships.
- Moncton has expressed an interest in being selected as a location for a CFL expansion team.

### **Amenities and Features**

- Field surface is a natural grass surface.
- Track surrounding the field has a Mondo FTX surface. A removable Terracover of over 34,450 sf protects the running track during non-athletics events.

### **Capital Project Details**

Construction began in April 2009 and was completed in July 2010. The first event held at the venue was the Olympic Flame torch relay, which took place before the stadium was entirely complete. The Stadium opened in time for the 2010 World Junior Championships in Athletics. Construction was jointly managed by the City of Moncton and the University of Moncton.

Funding commitments were made by all levels of government, amounting to:

- \$7.5 million from Government of Canada (through ACOA)
- \$6.5 million from the Province
- \$5 million from City of Moncton

The University of Moncton's contribution of land for the project was valued at \$3.5 million.

The project came in approximately \$3.75 million over budget.

The facility was built to ensure the site would have the capacity to be expanded to allow for new opportunities in the future.

### **Facility Operations and Ownership**

The facility is jointly operated by the City of Moncton and the University of Moncton. A joint management committee is to be established tasked with scheduling, operations, and overseeing the stadium budget. The City of Moncton has a 25-year lease on the facility with an option to renew at the end of the 25-year period. It is intended that naming rights will also be pursued jointly.

## **Operating Financials**

Information unavailable.

## **Partnerships**

Athletics Canada supported the bid to host the IAAF World Junior Championships. There was also a strong partnership between the City of Moncton and the University of Moncton, the latter of which provided land for the project. The partnership was struck prior to construction and continues in the management of the facility.

## **Location and Surrounding Uses**

The Moncton Stadium is located on the University of Moncton campus adjacent to the Louis-J.-Robichaud Centre which includes a double-gym, swimming pool, tennis courts and an indoor track. The school of kinesiology and recreational studies programs are also run out of Louis-J.-Robichaud Centre.

The location features additional space for parking and the site has potential to be expanded.

## **Lessons Learned and Issues in Multi-Usage (e.g. Field Convertability)**

- Majority of seats were built in one endzone, which is not conducive to good sightlines.
- Bleacher seating is not to the expected CFL standard, and the facility is therefore seeing a reduction in ticket sales for Touchdown Atlantic.
- The running track poses issues for viewing of spectator events focused on turf – spectators are separated from the field and therefore the “intimacy” of the venue is lost.

## **Events Profile and Major Events Hosted**

Events having taken place in the Stadium are:

- Olympic Flame (prior to completion)
- IAAF 2010 World Junior Championships in Athletics (7 days)
- Touchdown Atlantic (CFL exhibition football match)

Scheduled events include:

- Moncton HubCity Track & Field Classic, July 8, 2011
- 2011 Atlantic Hershey Championships, July 9, 2011
- 2011 New Brunswick Athletic Championships, July 23-24, 2011
- Uteck Bowl (football) 2011, 2013, 2015
- Touchdown Atlantic 2, 2011
- Canadian Track Championships, 2013, 2014

**Other Information**

Based on the 2010-2011 University of Moncton Sports Calendar, men's and women's soccer teams used the facility on 13 days in the fall months of 2010.

Month	Event Days	Usage Type
August 2010	2	Men's and women's soccer (university intercollegiate)
September 2010	6	Men's and women's soccer (university intercollegiate)
October 2010	4	Men's and women's soccer (university intercollegiate)
November 2010	1	Men's and women's soccer (university intercollegiate)
TOTAL	13	

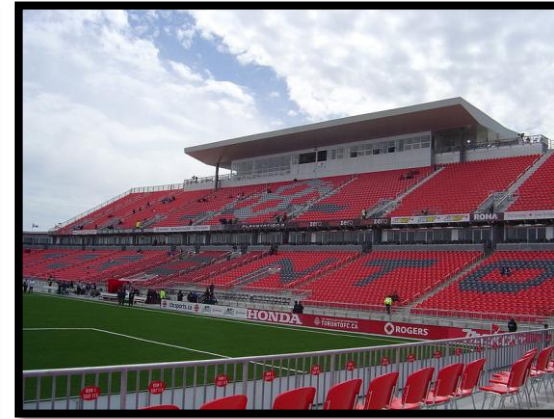
**Information Source(s)**

Province of New Brunswick, CBC News, Telegraph Journal, Université de Moncton.



## BMO Field

Toronto, Ontario



<b>Year of Opening:</b> 2007	<b>Capital Cost:</b> \$62.9 million (\$72.8 million including land acquisition)	<b>Capacity:</b> 22,108	<b>Building Footprint:</b> 31,000m <sup>2</sup>	<b>Facility Operator:</b> Maple Leaf Sports and Entertainment (ownership by City of Toronto)	<b>Key Uses:</b> MLS Soccer, Canadian national soccer team, major events hosting, some community sports use
---------------------------------	---	----------------------------	--	---	--



## **Background and Facility Description**

The notion of a soccer-specific facility was first proposed by the Canadian Soccer Association with a business case prepared in 2002. BMO Field was built in 2007 on the site of several previous stadia, at Exhibition Place in Toronto. With a variety of locations considered at different points in project planning, Exhibition Place was selected with agreement from City of Toronto, Canadian Soccer Association, MLSEL, and the Board of Governors of Exhibition Place. This soccer-specific stadium was designed to house national soccer in Canada as well as support MLS team Toronto FC, which is owned by the Maple Leaf Sports and Entertainment group (MLSEL). The facility was named in the successful bid to host the 2007 FIFA U-20 World Cup. As a public-private partnership, this 20,000 capacity facility is owned by the City of Toronto and managed by MLSEL. Both parties contributed to the construction cost, as did the federal and provincial governments. Recently an additional stand was built at the North end of the Stadium.

## **Anchor Tenants and Key Uses**

- BMO Field is primarily used for MLS soccer games (Toronto FC) and major soccer events hosting. It is also the home of the men's national soccer team.
- Other users include recreational soccer clubs and ultimate frisbee clubs. While the original intent for BMO Field was that it would serve many uses, these have recently decreased due to the negative impact on the natural grass field surface of overuse.
- Previously used by the MLL lacrosse team the Toronto Nationals, now known as the Hamilton Nationals.
- In 2009, the CFL undertook a study to explore the feasibility of using the BMO facility, however it was determined that the size of the field was too small to accommodate CFL uses without significant upgrades to the stadium.

## **Amenities and Features**

- BMO Field originally had FieldTurf instead of a natural grass field. In 2009, the City of Toronto approved installation of a permanent, natural grass surface to bring the facility in line with FIFA expectations. In 2010, MLSEL agreed to cover all costs of installing and maintaining the surface. A drainage and heating system was also installed at this time.
- 30 premium suites
- 566 club seats
- Press box at the top of the main stand
- Press and MLSEL have office space on site
- Fitness room
- Skills room
- A tarp is placed on the facility during the winter and the stands are winterized (e.g. leather is covered, etc.)
- Originally had a bubble for winter use – but this is no longer used
- 5,000 parking spaces

## **Capital Project Details**

Funding sources and amounts for project construction were as follows:

- Federal government: \$27 million
- Province of Ontario: \$8 million
- City of Toronto: \$9.8 million
- MLSEL: \$18 million including naming rights later resold for \$27 million over 10 years to Bank to Montreal

The federal contribution was conditional on Canada being awarded the 2007 FIFA U-20 World Cup.

In 2009, 1,249 seats were added at a cost to Maple Leaf Sports and Entertainment of \$1.972 million, which included upgrades to washrooms in a separate building just north of BMO Field. MLSEL also invested in the replacement of the FieldTurf at BMO field with natural grass.

Other capital project details include:

- Half of the pitch has LED advertising at a cost of \$1 million provided by Daktronics.

## **Facility Operations and Ownership**

BMO Field is owned by the City of Toronto and operated by Maple Leaf Sports & Entertainment Ltd. (MLSEL), a company which owns several sports teams including Toronto FC, the Maple Leafs and the Toronto Raptors.

Staff responsibilities are split between Ricoh Coliseum and the BMO Field, which are both operated by MLSEL. One staff member has oversight for BMO Field while another oversees the Ricoh Coliseum.

MLSEL's lease agreement with the City of Toronto includes:

- TFC pays rent based on a percentage of ticket revenue
- TFC is allocated a share of concessions, food and beverage and in stadium advertising
- TFC has priority booking
- Licensing revenue from suites and club seats and building sponsorship revenues remain with stadium

## **Operating Financials**

BMO Field has an approximate budget of \$7 million annually. In 2009, revenues of \$8.035 million were generated, and there were expenses of \$7.186 million. In 2010, BMO Field generated \$7.5 million in operating revenues; and cost \$6.856 million to run. Income came from the following sources:

- Rental income from events
- Ticket convenience fee
- Concessions

- Novelties
- Club fees
- Advertising and sponsorships
- Suites
- Other

In 2010, BMO Field had an operating profit of \$641,000 (exceeding the initial estimates of \$400,000). The operating agreement between City of Toronto and MLSEL provides for profit sharing between the City of Toronto and MLSEL. Since 2007, a total of \$1.2 million of stadium profits has been paid out to the City of Toronto.

Other operating details include:

- Currently rain does affect the gate and food and beverage revenues. Facility management is therefore currently looking at the feasibility of providing a roof covering the main stands.
- Major operating costs related to the field are management of the grass, which needs to be swapped every 3-4 years (vs. 5-7-year lifespan of FieldTurf). There is also a complex low-grade grass management system in place which involves an air pumping system as well as a heating system (pipes).
- There are 30 suites, each with a 3-year contract and revenues of approximately \$5,000/game/box.
- The food and beverage per capita spent is high at \$18 per capita. The merchandising spent is \$8-\$9 per capita (very high). Revenues based on food and beverage and merchandising was estimated at ¾ of revenues.

## **Partnerships**

The arrangement between the City of Toronto and Maple Leaf Sports and Entertainment is deemed a successful example of public-private partnership. MLSEL manages the venue on behalf of the City of Toronto and the operating agreement provides for sharing of any profits with the City of Toronto.

When the FieldTurf was replaced with natural turf and community use had to be restricted to a very few hours, MLSEL and the City came to an arrangement whereby MLSEL provided funding to enable the use of a nearby stadium for community use.

## **Location and Surrounding Uses**

BMO Field is located on the site of several previous stadia, within an exhibition and trade show area near Toronto's waterfront.

## **Lessons Learned and Issues in Multi-Usage (e.g. Field Convertability)**

It can be difficult to accommodate both professional sports and community use in the same natural turf soccer facility, due to the negative impact of intensive use on the grass surface. Therefore this facility does have some community use (24 hours per month) but most has been moved to a nearby field due to the loss of the FieldTurf, which was more resilient and highly programmable.

There has been discussion of moving the CFL team to this facility, however this would require significant renovations to the facility and has been abandoned at this time. The facility does have the potential to accommodate an additional 8,000 spectators without making significant changes to the facility.

### **Events Profile and Major Events Hosted**

BMO Field hosted between 26-32 events in each year in its first two years of operations.

Past events include:

- Genesis concert
- MLS All-Star Game
- MLS Cup
- 2007 FIFA U-20 World Cup
- Toronto Nationals lacrosse games
- Canada men's national soccer team
- Bill Clinton speaking engagement
- 2008, 2009, 2010 Nutrilite Canadian Soccer Championship
- 15 MLS soccer games each season
- FIFA/Canadian Soccer Association exhibition games
- Other soccer "friendlies"

There has only been one concert at the facility since it opened in 2007 (a Genesis concert). In the Toronto context, there are several competing venues in the area, including one owned and operated by a major event promoter. Regardless, the facility is able to draw some six international events per year.

### **Other Information**

- There have been very preliminary discussions of expansion of the seat count to 30,000 and creating a partial roof cover, however no firm decision has been made and no timeline has been established.
- Operating hours are from 7 am to 7pm. On match days the facility is open for 24 hours over two days.

### **Information Source(s)**

Site visit, J. Keating, Exhibition Place Board of Governors, MLSEL, Toronto Star, MLS.

## Saputo Stadium

Montreal, Quebec



<b>Year of Opening:</b> 2007 (renovation work will be completed in 2012)	<b>Capital Cost:</b> \$17 million excl land.(\$23 million expansion currently underway)	<b>Capacity:</b> 13,034 fixed seats (expandable to 17,000) – being expanded to 20,341 fixed seats	<b>Building Footprint:</b> 29,000m2	<b>Facility Operator:</b> Saputo Stadium, incorporated non-profit organization with links to MLS team ownership	<b>Key Uses:</b> MLS Soccer, other soccer events hosting, team administrative offices
---	--	--	--	--	--

### **Background and Facility Description**

Montreal's Impact soccer team previously played at the Claude-Robillard Sports Complex, a 10,500 seat facility with an athletic track surrounding it. While it was well located, in the opinion of the Montreal Impact administration, the track's presence made the stadium feel less intimate and affected its ambiance—and despite attempts, it was not possible to remove the track. The seat count was also becoming a limiting factor, since an average of more than 9,500 spectators were attending games from the 2004 season onward. The new Saputo stadium opened in 2007 in Olympic Park. It currently seats just over 13,000 and has the ability to expand to 17,000. The stadium is now being upgraded and its fixed seating increased to 20,341 in preparation for the Major League Soccer expansion to Montreal in 2012. The renovation is expected to be complete by March 2012.

### **Anchor Tenants and Key Uses**

- The intention is that the facility will be used almost exclusively for soccer-related events, both MLS soccer team games, and other soccer uses such as national and international championships and exhibition matches.

### **Amenities and Features**

The field is covered with natural turf, which is key for attracting international teams to play at the venue. Other amenities and features include:

- 16 corporate boxes (will be increasing to 40)
- 14 corporate marquees
- 6 dressing rooms
- Administrative offices for Montreal Impact in a specially constructed building
- 3 practice fields including 1 covered field
- 6,130 parking spots
- Stands on three sides of the field
- 1,586 covered seats (will increase to 6,948)

### **Capital Project Details**

Construction began in 2007 and was completed in 2008 in time for the beginning of the Montreal Impact soccer season.

Construction of the facility at a cost of \$17 million was entirely privately funded. The Saputo family donated \$7.5 million of this amount. The remaining \$9.5 million was secured through a 25-year loan guaranteed by the Saputo family. Through a lease agreement, the Régie des installations olympiques (RIO), the agency of the provincial government created after the 1976 summer Olympics in Montreal, provided 31,640 m<sup>2</sup> of land to the project.

The current expansion project will add 7,000 fixed seats and 30 corporate boxes to the current set up at a cost of \$23 million (entirely financed through a Provincial grant).

### **Facility Operations and Ownership**

The Saputo Stadium is located on lands owned by the RIO (Régie des installations Olympiques) — the provincial government authority set up to manage the Olympic park lands and facilities after the 1976 Summer Games. A nonprofit organization (Saputo Stadium) with links to the Impact Soccer Team Management manages the facility and leases the land from the RIO. There is a 40-year lease agreement after which the agreement can be renewed for another 40-years, or, alternatively, facilities and the land become the property of the Olympic authority.

### **Operating Financials**

It is difficult to separate costs of the Stadium from costs of the Montreal Impact MLS team (while they are two separate incorporated nonprofits, the manner in which costs and revenues are allocated is somewhat arbitrary in that (for example), marketing and accounting are shared between the two organizations.

This being said, the Stadium's budget is currently approximately \$1.8 million, of which a full \$800,000 is property taxes, about \$700,000 goes to utilities, maintenance, turf maintenance and security, and \$300,000 is allocated to staffing costs. These figures are expected to change in 2012, with the expansion to MLS, when, among other changes, property taxes will increase, and all operations will increase in scale (e.g. more security on site, more maintenance, etc.) Security is quite a significant line item (can easily go over \$150,000 in 24/7 on site security costs).

The Stadium has few revenues as such, other than the rent paid to it by the Montreal Impact team. Some naming rights are allocated to the Stadium, but food and beverage revenues remain with the team. The revenue side is again, somewhat arbitrary based on how revenues are distributed between the Impact Soccer Team organization and the Stadium organization. It is anticipated that one of the practice fields which has artificial turf will soon be rented to outside groups, but rental revenues are not expected to be very high. The main stadium will not be heavily used, since it has a natural turf surface which requires that usage be capped at 15 hours per week to be maintained in good shape.

### **Partnerships**

The Olympic Agency provided land through a lease agreement. The Olympic Stadium is located adjacent to the Saputo Stadium, and will be used for occasional major soccer events.

### **Location and Surrounding Uses**

Saputo Stadium is located at the Parc Olympique, in the heart of the Hochelaga-Maisonneuve neighbourhood and in proximity to two major thoroughfares. Initially, the facility was to be located in a more remote location known as the Technoparc, but this option would have taken longer to develop. It would have been part of a broader redevelopment of an area, which is anticipated to be complete in 2025. The Parc Olympique is subway-accessible, has parking facilities, and with other infrastructure already in place, was ultimately selected.

The Olympic Stadium is located adjacent to the Saputo Stadium, and will be used for occasional major soccer events.

### **Lessons Learned and Issues in Multi-Usage (e.g. Field Convertability)**

In terms of multi-usage, it is anticipated that the facility will be used almost exclusively for soccer events – provincial, national and international. It is not anticipated that other types of events will take place at Saputo Stadium. Negotiations are ongoing for use of the stadium by other groups.

When the expansion was originally contemplated, the administration of the Impact soccer team visited about 10 other stadia in the U.S. and Canada. While the original vision for the facility was that it would be a multipurpose space, as the group toured, they began to realize just how much had to be invested in making a multipurpose space truly work. For example, they knew they would be going with a natural turf facility, however the cost of purchasing a cover for the turf for other types of events alone would be \$1 million. In the end the decision was made to focus on making the Saputo Stadium an excellent soccer facility and while occasional major events may happen in the facility, they would not actively pursue hosting other types of events as a main business strategy.

Key lessons learned were:

1. To discuss the taxes to be paid prior to construction of a new facility. The long-term lease concluded with the Olympic Authority led Stadium representatives to believe they would be exempt from property taxes as the Olympic Authority is. There was no cost for the land up front, however one major lesson they learned after the fact was that by taking on the long-term lease they would have to pay municipal taxes for the building. Because this wasn't known ahead of time, and therefore wasn't negotiated, it now amounts to \$800,000 per year and stands to be increased when renovations are completed.
2. The decision around the type of turf is very important as it has many implications for cost, maintenance and usage - they are happy with their choice as it makes sense for them but there are higher costs associated with natural turf vs. artificial
3. Beware of wanting something to be too 'multipurpose' - for something to be truly multipurpose it doesn't just happen - you have to really understand your market.

### **Events Profile and Major Events Hosted**

Past events have included MLS games and the 2008, 2009, and 2010 Nutrilite Canadian Soccer Championships.

### **Other Information**

The decision to expand the seat count to 20,000 was driven in part by the design of the existing stadium; there was a desire to “fill in” the existing seating rather than to build on top of it, and the numbers came in around 20,000. In addition, there was a desire by the Impact soccer team to send a message of the team and its facility being in the “big leagues,” since Montreal’s professional football and hockey teams play in facilities with over 20,000 seats.

### **Information Source(s)**

Richard Legendre, VP of Saputo Stadium and Montreal Impact, Régie des installations olympiques (RIO), RueFrontenac.com, MLS.



## Percival Molson Memorial Stadium

Montreal, Quebec



<b>Year of Opening:</b> 1917 (most recent renovation 2010)	<b>Capital Cost:</b> \$29.3 million (most recent renovation)	<b>Capacity:</b> 25,000 (not expandable)	<b>Building Footprint:</b> 24,000m <sup>2</sup>	<b>Facility Operator:</b> Alouettes and McGill University (ownership by McGill University)	<b>Key Uses:</b> CFL Football, University Football
---	---	---	--	---	---

### Background and Facility Description

Percival Molson Stadium was first built in 1917 and has had several renovations and changes to its seat count over the decades. Beginning in 2003, the Montreal Alouettes CFL team, together with McGill University, put in motion a comprehensive multi-year plan for renovation of the facility which started with a \$13.3 million Phase I project to replace the old field surface with new FieldTurf. In addition, areas under two of the grandstands, including dressing rooms, showers and officials' rooms were renovated, and concessions and washrooms were expanded and improved. This phase of the project had federal, provincial and municipal contributions. New lighting was installed and better access roads to the stadium were created. The City gained access to McGill's facilities.

The second phase of the Plan (undertaken more recently in 2009) involved expanding the seat count to 25,000 and other improvements at a cost of \$29.3 million, with funding from the Province, the City, and the Montreal Alouettes.

### **Anchor Tenants and Key Uses**

- Used primarily by the Montreal Alouettes for their regular CFL season and by the McGill Redmen football and other teams. Football Quebec, the provincial football association, is an occasional user (e.g. for championships).
- Besides football, other activities taking place in the venue include soccer, ultimate frisbee, track and field, lacrosse, rugby and softball. Users include recreational and corporate teams (e.g. soccer clubs), local private schools (for intercollegiate events) and McGill clubs.
- In the summer there is a children's soccer camp.
- McGill University is considering moving its orientation activities to the facility.
- The City of Montreal has access to the facility for free for a limited number of hours per month to run its own recreation programs.

### **Amenities and Features**

- The Percival Molson Stadium features fixed seating for 25,000 and 18 private boxes.
- The playing surface is FieldTurf, installed in July 2003, which replaced an artificial surface installed 13 years earlier.
- There is a 3-lane 400m track.

### **Capital Project Details**

The most recent capital project begun in 2009 and completed in 2010 had a value of \$29.3 million, funded by:

- Province of Quebec: \$19.3 million
- Montreal Alouettes (Bob Wetenhall): \$6 million
- City of Montreal: \$4 million

The work involved the addition of 4,800 seats, installation of a new seating deck, construction of luxury suites, elevators, and a new video scoreboard.

In return for its contribution to the capital cost of the project, an agreement was struck with the City of Montreal to allow for free use of the facility for City-run activities (up to a certain number of hours). McGill University also agreed it would not host major concerts at the facility due to noise concerns.

### **Facility Operations and Ownership**

The facility is owned and operated by McGill University. McGill University entered into an agreement over a 20-year term with the Alouettes, providing access to the facility and the adjacent 60-space parking area for 24 hours prior to kickoff. McGill University has access as of 9am on

the day following game day. The Alouettes do not have offices at the Stadium and do not use the field for practices. Storage space, concession areas and lockers are leased to the team on an annual basis.

The Alouettes are responsible for stadium operations whenever they have use of the grounds on game days (including security, box office, ushers, maintenance, janitorial, etc.) They are also responsible for concessions and retain net income. They receive 100% of advertising and sponsorship revenue and have the ability to place a logo anywhere on the building with the exception of centre field (which bears the McGill logo).

The Alouettes pay rent to McGill, a royalty for logos and percentage of gross revenue. They also provide McGill with a surcharge of \$0.50 per ticket and a fixed amount per game for facility staff costs, hydro and garbage disposal. Revenue derived from the luxury suites goes to Alouettes.

### **Operating Financials**

The facility operates on a break even basis. It costs approximately \$200,000-\$300,000 to operate the facility (utilities, maintenance, minor repair), excluding staffing and a turf replacement fund. There are 4 groundsman and other casual workers who take care of Percival Molson as well as other facilities and fields on the McGill campus.

The main revenue source for the Stadium is rental of the facility. Users include the Montreal Alouettes (key tenant), corporate soccer and ultimate teams, provincial associations (for tournaments), e.g. Football Quebec, and occasional rentals such as soccer friendlies.

During intercollegiate games, tickets and concessions are sold. However, rentals make up the bulk of revenues.

Attempts are made to ensure the facility is 'self-financing,' such that student fees do not go toward the Stadium operation.

### **Partnerships**

The agreement between McGill University and the Montreal Alouettes is an example of a unique partnership between a professional league and a post-secondary institution. The Alouettes gain access to the facility as of the evening prior to game day. They bring in their own catering and ticket taking staff, set up sound systems as required by the CFL, and clean the facility. By 2-3a.m. the following day the facility is left clean and available for use by another party. Turn over is sometimes very quick between uses but over time the relationship has been developed and there is now a good working relationship between the two parties.

### **Location and Surrounding Uses**

The Stadium is located on Mount Royal, overlooking the Montreal skyline. It is in proximity to the McGill University campus. Recent improvements to the site have included increasing its connectivity and access with the surrounding area.

### **Lessons Learned and Issues in Multi-Usage (e.g. Field Convertability)**

- The facility manager noted the importance of having clear and defined lease and rental agreements with all users.

- Multi-usage of the facility can be difficult for different sports as each would like its lines on the field (e.g. football, rugby, lacrosse, soccer). When television is involved there are similar demands. These have to be factored into operating costs (e.g. painting lines in green for a soccer game, which also potential means loss of rental time due to having to paint in good weather).
- Filling the facility in the fall is easy but in the summer there is more work to do in ensuring the facility is used day in and day out.
- Students sometimes worry that professional usage of the facility takes away access for intramural and intercollegiate activities, but having a professional team as a key tenant provides a key revenue source which allows the facility to break even and not use additional student funds to support itself.

### **Events Profile and Major Events Hosted**

The facility is a sporting facility only and has an agreement with the City of Montreal that it will not pursue other types of entertainment activities such as rock concerts. There have been exceptions, such as a performance of the Montreal Symphony Orchestra organized by the Montreal Alouettes.

Major events:

- Football Quebec Provincial Championships
- Zidane and Friends
- Canada vs. Brazil soccer
- The Police (prior to change in event policy)

### **Other Information**

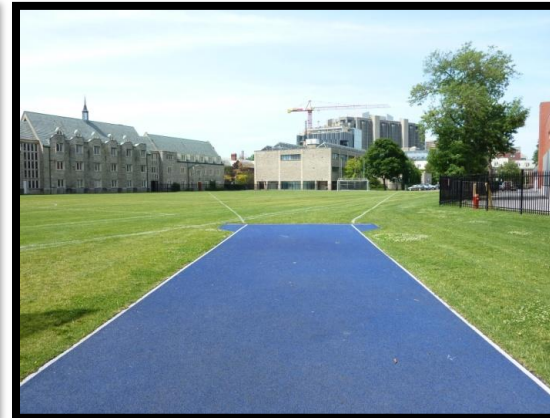
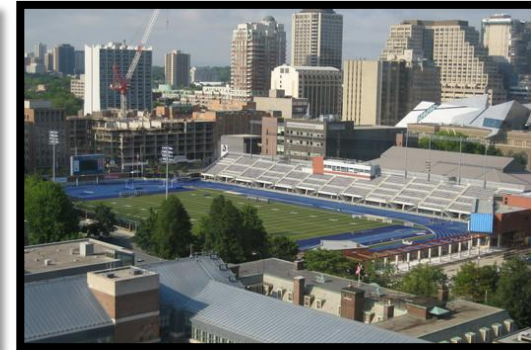
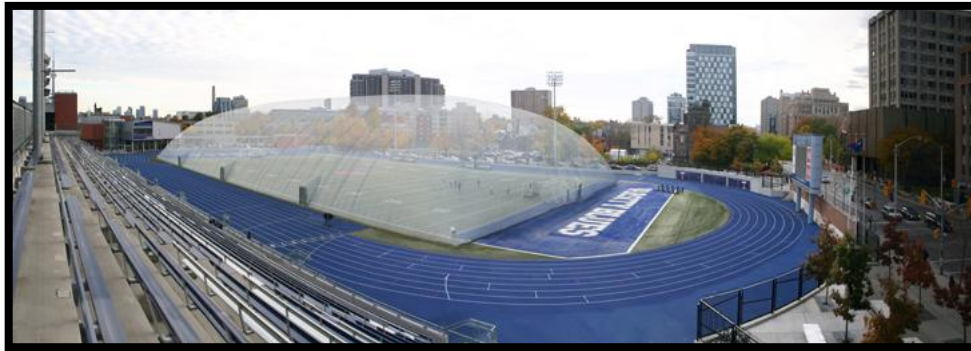
Information unavailable.

### **Information Source(s)**

Philip Quintal, McGill University; Daily Commercial News, Montreal Alouettes.

# Varsity Stadium

Toronto, Ontario



<b>Year of Opening:</b> 1898 (most recent redevelopment 2007)	<b>Capital Cost:</b> \$32.4 million (most recent redevelopment)	<b>Capacity:</b> 5,000	<b>Building Footprint:</b> 22,600 m2	<b>Facility Operator:</b> University of Toronto	<b>Key Uses:</b> University and community football, track and field, soccer, golf
--	--	---------------------------	---	--	--

## Background and Facility Description

Varsity Stadium is a University of Toronto owned stadium with a long history of occupying the same site in downtown Toronto on the campus of the University. The current Stadium was completed in 2007, and stands on a site that has held various incarnations of the Stadium since 1898,

the most recent of which was demolished in 2002. It is primarily a football and athletics stadium used by collegiate teams and by the community. A significant feature of the facility added in its most recent configuration is a winterized dome that allows activities to take place at the Stadium 12 months of the year.

### **Anchor Tenants and Key Uses**

The current Varsity Stadium has a single anchor tenant in the Varsity Blues collegiate football team. In the past, a wide range of anchor tenants have played at the Stadium including the Toronto Argonauts, the North American Soccer League's Toronto Blizzard and Minor league professional soccer team Toronto Lynx. Many major events were hosted such as soccer games during the 1976 Olympics, the Grey and Vanier football cups, a world lacrosse championship, and historic concerts including the Rolling Stones and Kiss. However this was at a time when the seat count of the facility was much higher than its current 5,000. (The seat count of the Stadium has varied over time, peaking at 22,000 in the 1950s).

Today, the Varsity Stadium's key uses include:

- International, intercollegiate, intramural competitions
- Recreational and instructional classes
- Children's programs
- High performance athlete training
- Drop-in recreational activities in winter
- Intramural games
- Driving range (drop-in golf in winter)
- Outdoor running
- Pickup soccer and ultimate frisbee
- Recreational skating and hockey during winter months
- Classes in golf and skating in the winter months

There is a University policy to provide for 75% utilization of the facility by students.

The air-supported dome erected in the winter is used for indoor soccer, field hockey, ultimate frisbee, flag football, cricket, and lacrosse. Its presence also expanded practice hours for track and field, football, field hockey, soccer, lacrosse, and rugby teams of the university, compared with the previous stadium.

The football field is programmed for some use in the summer, although utilization is quite low. Because of its urban location, there are also concerns from residents (a new condominium is being developed immediately north of the site and in recent years there have been complaints

from the residents about the brightness of the lights at the stadium – accordingly the University has often restricted the lighting of the stadium at certain points during the year, which has reduced programmability.)

When bubbled there is relatively aggressive programming of the space – there are 3 football fields running east-west which can be set up.

### **Amenities and Features**

The Varsity Stadium features:

- IAAF Class II 400 m 8-lane track
- Artificial turf field – first of its kind in Canada
- Dome for winter use
- Driving range in winter
- Changerooms
- Seating is now closer to Varsity Arena
- Air supported dome is one of the largest of its kind in Canada, covering the entire field

The Pavilion provides view of the track and houses a football team room, therapy room and offices for coaches and staff (shared with adjacent arena). There is an impressive press gallery which enables significant opportunities for field swatting and TV/radio commentary and is built to relatively high standards. However, it was noted that having some form of roof, even if it protects only the upper level seats would be appropriate to keep the elements off the stands, including providing some shade to the press box.

The southern end of the Pavilion contains a series of offices, team meeting rooms, a catering room overlooking the pitch (used for corporate events and meeting rooms) was built as an add-on to the facility (in the order of 6-7,000 sq ft). There is a change room facility of a very high standard (similar to BMO or Skydome), enabling it to accommodate international track meets, international athletes and potentially host professional exhibition games. It is rarely used, however it is an amenity to accommodate these occasional events in style.

### **Capital Project Details**

The renovation of Varsity Stadium began with demolition of the existing facility in 2002 as part of a multi-phase capital project to redevelop the Varsity Centre, in an effort to establish University of Toronto as a leader in high performance sport research, sports medicine and coach and athlete development.

Phase 1 of the work (completed in 2007) involved renovation of the Stadium and track to include a 5,000 seat grandstand, artificial surface playing field, change rooms, lighting, and an electronic scoreboard, for a cost of \$21.7 million. It also included the purchase of a winterized dome, which cost \$1.2 million. This portion of the work was financed by the University of Toronto. During the renovation process, the field and track were retained with temporary seating for 1,500 installed to allow collegiate activities to continue. Phase 2 of the work, completed in 2009,

involved the construction of an entry to the Varsity Centre complex now known as the Pavilion. This portion of the work cost \$9.5 million, with funding obtained from donations.

The final phase of work is currently in the capital fundraising stage, and will involve construction of the Goldring Centre for High Performance Sport, a \$58 million project (with \$30.5 million in philanthropic donations having been secured thus far). This 4-storey facility to include teaching and training facilities is expected to be complete in 2013.

### **Facility Operations and Ownership**

The Varsity Stadium is owned and operated by the University of Toronto.

### **Operating Financials**

- The facility operates at a loss in part because of the requirement of 75% utilization for students.
- The staffing costs are \$340,000 per year, which includes 3 managers, 1 permanent staff person and 11 part-time staff. There is also an associate dean whose role is to liaise with University administration (staffing cost not included).
- The bubble set up and take down costs \$120,000 each season (\$60,000 each for set up and take down).

### **Partnerships**

From 7 a.m. to 1 p.m. every day 2/3 of the infield is used as a golf practice facility. The arrangement is that Angus Glen Golf Course brings its coaches and equipment down and provides coaching to members of Angus Glen Golf Club as well as anyone else who takes out a membership for that particular program.

### **Location and Surrounding Uses**

- Located in downtown Toronto, easily accessible by public transit, on the University campus and adjacent to the Varsity Arena. In the neighbourhood are several cultural and sports institutions including the Royal Ontario Museum, Royal Conservatory of Music, and other University of Toronto campus facilities and outdoor spaces.
- Within the Varsity Centre complex, there is currently a 4,000 seat arena which shares the Pavilion entry. A \$58 million centre for high performance sport is under development that would be located adjacent to the Stadium.
- In addition to the track, the adjacent Trinity College Soccer pitch has been revamped to include necessary tracks (javelin track) and discus cage, shot putt, etc. to allow for field events to occur. This site is contiguous with the south end of Varsity Stadium.

### **Lessons Learned and Issues in Multi-Usage (e.g. Field Convertability)**

- Ensuring that the facility would have the ability of to be multi-use was one of the main reasons the renewal plan which was executed was approved over another 25,000 seat stadium option that was under consideration. The University required 12-month a year usage, which led to inclusion of the winterized bubble which is installed in November and taken down in May.



- There are necessary compromises to the use of both the football field and the track – when setting up the bubble for the off season and hosting other events on the infield, forklift trucks and other vehicles have to cross the athletics track – this raises questions about the warranty of the surface and whether the multiuse component will void most of the warranty. The track has recently been re-laid because of a failure of the surface.
- The end zones for football are also examples of compromise- used for high jump and pole vault as well as housing for sand pits for the jumping events – laying aluminum boards on top of these structures when football games are in progress is acceptable, however the surface is not as safe as it might be with solid ground.
- The track (which is IAAF sanctioned) is not part of the bubble. Ideally, including the track as part of the bubble would have been a good idea.
- The field is also used when domed during summer months when catering food and beverage events – this creates a problem of retained food stuffs, deleterious materials and even glass on the field which is difficult to remove.
- It is possible to place a top surface on top of the field, however to do so for this large a field is expensive.

### **Events Profile and Major Events Hosted**

- Festival of Excellence featuring Usain Bolt
- OFSAA Track and Field Championships (major intercollegiate high school track event, held over 3 days)
- 2009 Canadian Senior Track and Field Championships (held over 4 days)
- 2011 Canadian Masters Track and Field Championships (held over 3 days)
- 2010 Canadian Track and Field Championships
- 2008 Canadian 10,000m Championships

### **Other Information**

- Overall there is a community mandate to the facility even though it is of an international standard for track and it certainly requires better utilization in the summer months. It is however an icon for the downtown campus of the University of Toronto.
- Attendance for Varsity Blues football games is in the order of 500 per game.
- For an international track meet, attendance is typically no more than 2,200.
- When the facility is bubbled, it is open from 7 a.m. to 11 p.m. with 25% available for rent to non-student uses. Students do not pay for programming. Rates for 1/3 of the field are \$140 per hour (\$300 for the whole field per hour). The adjacent arena is rented out at \$225 per hour.

### **Information Source(s)**

Doug Graham, Property Manager, University of Toronto, Daily Commercial News, The Varsity.

## PEPS Outdoor Stadium

Quebec City, Quebec



<b>Year of Opening:</b> 1994	<b>Capital Cost:</b> Information unavailable (adjacent indoor sports complex currently being expanded, \$85 million project)	<b>Capacity:</b> 12,257 fixed seats, expandable to 18,000	<b>Building Footprint:</b> 35,000 m2	<b>Facility Operator:</b> Université Laval	<b>Key Uses:</b> University football, soccer, rugby, provincial tournaments
---------------------------------	---	--	---	---	--

### Background and Facility Description

The Laval University Sports and Physical Education Pavillion (PEPS) opened in 1970 at a cost of \$8 million with several components added over the years. The outdoor Stadium was added in 1994.

### **Anchor Tenants and Key Uses**

- Used 6 months of the year: from mid-April to mid-November
- Rouge et Or University football team
- Approximately 25-30 teams play on the field each week
- Facilities are open 8:30am-9pm, 7 days per week (soon to expand to 11pm)
- Approximately 10-15 special events such as provincial track tournaments, etc. per year
- Are considering offering big screen events (e.g. for World Cup, Tour de France)

All PEPS facilities are available for students as well as residents of Quebec City for recreational uses.

### **Amenities and Features**

- Outdoor stadium field surface is an artificial surface
- Surrounded by a 400m track

The PEPS sports complex as a whole includes the following exterior facilities:

- 1 golf driving range
- 6 tennis courts
- 2 basketball courts
- 6 volleyball courts including 4 lit courts
- 3 synthetic volleyball courts
- 1 football stadium with 18,000 seats, 400m track, lit
- 3 softball fields, lit
- 1 multipurpose field (e.g. for soccer)

The PEPS interior facilities include:

- arena with 2 rinks, including one with 2,000 seats
- 1 indoor stadium with 3,000 seats, interior athletics track (200m) with four tennis courts in the infield, trampolines
- 1 olympic size swimming pool with 500 seats
- 1 triple gym with 2,000 seats
- 2 other gyms
- climbing wall
- squash courts
- 2 weight rooms including 1 used by about 8,000 people daily
- medical clinic
- judo room

- dance studios
- golf room
- yoga room

The interior is being expanded as part of the "Super PEPS" project in partnership with the City. The expanded facilities are expected to be completed in 2013.

### **Capital Project Details**

The outdoor stadium was built in 1994. The original capital cost is unknown.

### **Facility Operations and Ownership**

The facility is owned and operated by Laval University.

### **Operating Financials**

The entire PEPS complex is operated with a budget of approximately \$10 million. This figure includes staffing, maintenance and purchases related to operation, administration and programming of both indoor and outdoor facilities. There are about 10 maintenance staff who work on all indoor and outdoor sports facilities and 3 students are hired over the summer months to assist. Costs are offset in part by \$2 million in student athletics fees. Facility rental also contributes revenues to PEPS operations. Volunteer roles (e.g. security) also contribute to savings. The annual operating cost of the Stadium itself cannot be easily divorced from the global budget, but is estimated to be in the neighbourhood of \$200,000, including an \$80,000 annual reserve fund toward the replacement of the turf every 10 years.

The Rouge et Or football team brings a lot of publicity to the Stadium but it uses it free of charge and does not contribute to its operations. The team has its own operations of about \$2 million which are entirely separate from the PEPS budget. Food and beverage sales often go to the university teams to help them balance their own budgets.

### **Partnerships**

A partnership with the City of Quebec allows the facility to be used by local residents.

### **Location and Surrounding Uses**

The PEPS outdoor stadium is located on the campus of Laval University as part of a major indoor and outdoor sports complex, believed to be the largest east of Montreal.

### **Lessons Learned and Issues in Multi-Usage (e.g. Field Convertability)**

- Field is rented out for \$150/hr for community groups, rates are negotiated for bigger events such as tournaments (have sent a follow-up

email for more info on this)

- Previously \$7,000/month in rental equipment, not counting cost of diesel), maintenance, administration, etc. but the VP maintained that the ongoing operating costs were not particularly high

### **Events Profile and Major Events Hosted**

- Vanier Cup, 2009, 2010
- Provincial track championships

### **Other Information**

A new facility (known as the Super PEPS) is now being constructed that will have press rooms, VIP suites, offices for officials, concessions, washrooms and other public spaces that will be shared among several of the indoor and outdoor facilities that are part of the PEPS. Along with a new indoor soccer centre, swimming pool and gym, this initiative will cost \$85 million, of which \$10 million is coming from the City. The City will also be providing \$2.2 million per year in ongoing operating support for these new indoor facilities. They will also use these facilities 70% of the time, with the university using the other 30% of the time. There is an agreement whereby the University will be the operator however any surplus revenues will return to the city. This partnership model is deemed a good one for the university and the City and the University have several such agreements in place.

### **Information Source(s)**

Jacques Ferland, PEPS; Université Laval, Ville de Québec.

## TD Waterhouse Stadium

London, Ontario



<b>Year of Opening:</b> 2000	<b>Capital Cost:</b> \$10.65 million Excl. land	<b>Capacity:</b> 8,000 (expandable to 16,000)	<b>Building Footprint:</b> 37,500 (excluding parking)	<b>Facility Operator:</b> University of Western Ontario	<b>Key Uses:</b> University football, track and field, soccer, community uses including City-run recreational programs
---------------------------------	---	--	--	---	---

### Background and Facility Description

The TD Waterhouse Stadium is a football and athletics stadium located on the campus of the University of Western Ontario in London, Ontario and built primarily for the 2001 Canada Summer Games at a cost of just over \$10 million. Owned and operated by the University of Western Ontario, it replaced the J.W. Little Stadium. It is used by university sports teams as well as being significantly used by the broader community due to a unique arrangement with the City of London (the Stadium receives a \$100,000 annual grant toward provision of subsidies for use by recreational groups).

## **Anchor Tenants and Key Uses**

Primary users of the facility are:

- University of Western Ontario's Mustang football, soccer, field lacrosse, field hockey and track and field teams.
- Also used by minor football clubs and is the host facility for the newly formed FC London of the USL Premier Development League.
- The City of London uses approximately 60% of all bookings while the University is responsible for about 40% of bookings

Other users and uses include:

- Intramural teams
- Sport Western summer camps for children
- London Western Track & Field Club (community association)
- London Legion Track & Field Club (community association)
- Minor football (London Falcons, London Thunderbirds, London Silverbacks)
- High school track and field meetings and football games
- Schools from all boards (track meets)
- Lacrosse
- Field hockey
- Wrestling
- Kinesiology activity classes
- Ontario Football Alliance, IA Football
- Special events (e.g. Special Olympics, Canadian Cancer Relay for Life)

The University uses the Stadium primarily from mid-August to the end of November, while most community use is from April to August. During the Fall, there are few community events (other than special events such as high school football championships).

Up until this year the City of London only had one artificial field. Two new fields were put up in 2011 which may affect usage in future years.

## **Amenities and Features**

Key amenities and features of this facility include:

- Has permanent lines for soccer and football; additional lines can be requested
- 8 lane 400 m track standard rubber track
- 4 sandpits
- CFL regulation size artificial turf
- Astroturf replaced by FieldTurf in 2007 at a cost of \$1 million
- Ample parking
- Fully wheelchair accessible

- 1,000 lumens lighting ideal for television coverage and evening events
- Spacious change rooms and shower facilities
- Equipment, training and referee rooms
- Concession and vending services
- Press box for TV, voice and print media
- Labatt lounge and patio area accommodates up to 180 guests
- Seating is provided in two sections of bleachers on east and west sides of the field
- The track and the artificial turf of the Stadium can be separately rented

### **Capital Project Details**

The capital project cost a total of \$10.65 million, of which \$2.5 million was provided by the 2001 London Alliance Canada Summer Games Organization, with the remainder coming from community fundraising.

The facility is owned and operated by the University of Western Ontario. There are no full-time employees; staff from the University Arena are responsible for general maintenance of the Stadium. Typically one staff person is assigned to the Stadium for 2 hours per day of maintenance. Part-time students are used on weeknights and weekends to operate the facility while the field or track is booked.

### **Operating Financials**

The facility is self-financing. Not including future replacement costs, the Stadium operating budget is generally in a surplus position (under \$50,000). Annual revenues are in the order of \$300,000 (so costs are in the order of \$350,000, of which \$120,000 is allocated to staffing).

The City of London provides \$100,000 annually to subsidize community groups. University and community groups must pay the same amount for use of the facilities. Any portion of the \$100,000 that is not used goes directly to the Stadium.

### **Partnerships**

There is a partnership in place between the City of London and the University of Western Ontario which allows community non profit organizations to rent the facility through a municipal subsidy. This program has been critical to the financial success of the Stadium.

### **Location and Surrounding Uses**

The facility is located on the campus of the University of Western Ontario.



## **Lessons Learned and Issues in Multi-Usage (e.g. Field Convertability)**

Tips and hints from the Stadium Manager:

- Avoid aluminum stands if at all possible
- Be careful when determining lighting levels. It costs a user nearly \$2,000 to turn the lights on in addition to hourly consumption, which came as a surprise when the first utility bill came in. Full lighting is therefore used no more than about once per year. In fact, it costs more to light the field than to rent it.
- The Facility stayed away from mono-filament fields on the second field, as poly-filament is much more durable.
- If a track is being installed surrounding the field, a tip is to ensure the steeplechase, pole vault and long jump areas are located on the outside of the track as it is at this Stadium – this allows for better utilization of the field and the track simultaneously.

## **Events Profile and Major Events Hosted**

Major events hosted have included:

- Exhibition CFL game in 2002
- Pan Am Field Hockey Championships
- World Transplant Games
- Ontario Paralympic Championships
- OFSAA track and field championships
- World Field Lacrosse Championships
- 2010 Special Olympics
- 2001 Canada Summer Games key venue
- Ontario 10,000m Championships

## **Other Information**

Rental rates appear on the website of the Stadium. There are rates for field rental, track rental, lighting rates, meeting facility rates and description of a rental subsidy program provided by the City of London for non-profit community groups.

The facility is open from April 1 to November 30 only and can be reserved from 7am-11pm, seven days a week.

## **Information Source(s)**

Frank Erle, University of Western Ontario.

## King George V Park

St. John's, Newfoundland



<b>Year of Opening:</b> 1925 (2006)	<b>Capital Cost:</b> \$3.6 million Unknown if land cost included	<b>Capacity:</b> 6,540	<b>Building Footprint:</b> 16,200m <sup>2</sup>	<b>Facility Operator:</b> St. John's Soccer Association (owned by City of St. John's)	<b>Key Uses:</b> Primarily soccer - league and occasional national events
--	--	---------------------------	--	---	--

### Background and Facility Description

This 6,540-seat facility was the first soccer-specific facility developed in Canada. It was renovated in 2006 on the grounds of a 1925 stadium.

### Anchor Tenants and Key Uses

- Men's and Women's university soccer
- No winter programming
- 2,000 people 6-16 use facility in the summer
- Occasionally used for ultimate frisbee and cricket

### Amenities and Features

- Field Turf (FIFA regulation size)
- 4 change rooms
- 1 concession

- 1 small boardroom

### **Capital Project Details**

- Was constructed in 2006 for \$3.6 million, estimated to be at least twice that cost today
- 1/3 – 1/3 – 1/3 venture with St. John's Soccer Association, City and Province/Feds
- \$1.1 million contributed by St. John's Soccer Association
- Electronic advertising and landscaping structure at main gate cost \$60,000 and has more than paid for itself over one or two years.
- Field turf lines cost \$4,000 to put in with the field and are the only markings allowed on this soccer only facility.

### **Facility Operations and Ownership**

The facility is owned by the City of St. John's and operated by St. John's Soccer Association, who pay a \$1 annual lease.

### **Operating Financials**

- Operating costs are in the order of \$80,000-\$100,000 per year including staff costs (1 maintenance staff person employed in the summer; security guard; office person; concession person. This also includes \$37,000 in heating and lighting costs.
- Revenues from the league, sponsors, tickets provide between \$200,000-\$300,000 in revenues per year. The surplus is used to pay down the mortgage held by the City (on a 10-year amortization).
- Administration of the facility is by the head of the St. John's Soccer Association on a volunteer basis.

### **Partnerships**

A substantial amount of the parking area near the Dominion grocery store is allowed to be used as per an agreement with the Stadium facility.

### **Location and Surrounding Uses**

- Located in downtown St. John's, adjacent to Quidi Vidi Lake and a Dominion store

### **Lessons Learned and Issues in Multi-Usage (e.g. Field Convertability) - Information unavailable.**

### **Events Profile and Major Events Hosted**

- hosts a number of leagues and two national events
- senior men's and women's teams have played in the past
- Challenge Cup
- Jubilee Trophy

### **Information Source(s)**

## Pizza Hut Park

Frisco, Texas



<b>Year of Opening:</b> 2005	<b>Capital Cost:</b> USD \$35 million for stadium excl. land (part of USD\$107 million sports complex)	<b>Capacity:</b> 21,193 (28,000 for concerts)	<b>Building Footprint:</b> 46,000m2 (excluding parking)	<b>Facility Operator:</b> Frisco Soccer, LP (owned by City of Frisco, Texas)	<b>Key Uses:</b> MLS soccer, high school football games, training, concerts and other major events
---------------------------------	---	--	--	---	---

### Background and Facility Description

Completed in 2005, Pizza Hut Park is a sports park with 17 fields, offices and amenities in addition to a 21,193-seat stadium, the third soccer specific stadium to be built in the United States and the largest multipurpose professional and youth soccer complex in the world. Built to accommodate an MLS soccer franchise, but created with community and educational uses very much in mind, this complex is the result of a unique partnership between the City of Frisco, a local school board, the county, and a professional sports ownership group (Hunt Sports Group, owners of the Dallas FC MLS soccer team). The facility includes a permanent stage and several training fields adjacent to the stadium.

### Anchor Tenants and Key Uses

- Pizza Hut Park's primary tenant is FC Dallas, a professional MLS soccer team.

- The Frisco Independent School District makes use of the complex for high school football and soccer games.
- The facility is also available for major international and national soccer matches, amateur tournaments and events, major concerts, public entertainment, and other community events.

Other tenants include:

- Stadium and field management
- FC Dallas front office staff
- North Texas State Soccer Association management (15 year marketing agreement)
- Centerplate
- Baylor Rehabilitation Facility
- United States Youth Soccer Association management (20-year lease)
- Texans Credit Union Walk of Fame

### **Amenities and Features**

Pizza Hut Park features:

- Total of 180 club and suite seating
- Consists of 17 tournament-grade fields for youth and high school soccer
- Video displays
- Permanent stage
- Open view concession stands
- 6,500 sq ft private stadium club available for rental
- 17 luxury suites (500 sq ft each)
- Dr. Pink Field is used for high school football and soccer
- Pavilion area at centre of sports park with concessions, restrooms, tournament headquarters, first aid, picnic tables
- 3,183 parking spaces

### **Capital Project Details**

Capital costs for the project included:

- Land purchase: \$18.6 million
- Roads and infrastructure: \$3.4 million
- Parking: \$3 million
- Tournament fields: \$5 million
- Main stadium: \$35 million
- Total project cost: \$65 million, plus \$25 million in enhancements with cost overruns responsibility of Hunt Sports Group

The cost of the soccer complex was covered by:

- Collin County: \$20 million (through existing mall tax increment financing)
- City of Frisco: \$20 million
- Frisco Independent School District: \$15 million (through tax increment financing)
- Hunt Sports Group: \$10 million, plus \$25 million in enhancements

Pizza Hut also purchased naming rights for the facility from Hunt Sports Group for \$25 million over 20 years.

### **Facility Operations and Ownership**

Pizza Hut Park complex and the Stadium is owned by the City of Frisco. Frisco Stadium LP (an affiliate of Hunt Sports Group) has a 20-year lease and operating agreement with the option to be renewed for 20 years upon expiry. Hunt Sports Group has responsibility for maintenance of the facility through to 2025.

The City of Frisco receives \$100,000 annually in rent from Hunt Sports Group. In exchange, during this period, Hunt Sports Group will have the ability to retain all revenue generated from the complex including naming rights.

### **Operating Financials**

Revenue estimates for Dallas FC's ownership in the first season in the new Stadium (2006) include generating:

- \$630,000 annually from luxury suites
- \$1.25 million in naming rights sponsorship
- up to \$480,000 in parking revenues
- Regular season ticket revenue \$2.7 million

This is in addition to concessions, merchandise, ticket or other sponsorship revenue.

- Operating costs include a \$2 million annual player payroll

Detailed operating financials for the Stadium facility itself are unavailable.

### **Partnerships**

There was a unique partnership struck between the City of Frisco, the Hunt Sports Group, Collin County and the Frisco Independent School District, each of which contributed to the capital cost of the facility.

## **Location and Surrounding Uses**

Pizza Hut Park is located on 117 acres, north of a new mixed use development called Frisco Town Square consisting of commercial, residential, retail and public uses, including a new City Hall building.

The purchase of the land involved over 10 owners and took 2 years to negotiate.

The Stadium facility is located in a larger soccer complex which includes many complementary uses such as offices of sports organizations, and 17 regulation fields used year-round for following programming:

- Youth and adult amateur soccer
- Local, regional, national, international soccer tournaments
- High school athletics
- Soccer camps, clinics, academies
- Training camp for professional teams
- Community and corporate events

## **Lessons Learned and Issues in Multi-Usage (e.g. Field Convertability)**

Information unavailable.

## **Events Profile and Major Events Hosted**

Pizza Hut Park hosts MLS matches, championships and tournaments for high school soccer and football, and an average of about 4 concerts per year.

Recent and planned events include:

- Jimmy Buffett
- Edgefest
- KISS
- Rascal Flatts
- Celebrate Freedom
- Ozzfest
- George Strait, Kenny Chesney
- MLS matches
- NCAA Football Championship
- Michael Brown Winter Classic (FC dallas youth - friendlies)

- Dallas Cup
- ODP National Championships
- USYSA National Championships
- Inter Milan

### **Other Information**

- Winner of 2005 Dallas Business Journal Best Community Impact Award
- First green professional sports stadium in Texas
- City of Frisco has a Sports Investment Strategy, objectives of which include:
  - Develop sports venues for professional, amateur and youth sports
  - Develop city as destination for tourist and visitors
  - Generate more business for restaurants and retail
  - Generate greater sales tax revenues
  - Generate greater hotel/motel tax revenues
  - Frisco residents use & enjoyment of sports
  - Enhance city's family friendly reputation city's family-
  - Differentiate Frisco from other cities

An estimated 20 FC Dallas events are hosted per year, generating about 464,000 spectators annually

Adding in utilization of the 17 soccer fields plus attendance at games will reach about 1.4 million participants and spectators each year

### **Information Source(s)**

Pizza Hut Park, City of Frisco, MLS.



## Home Depot Center Soccer Stadium

Carson, California



<b>Year of Opening:</b> 2003	<b>Capital Cost:</b> USD \$87 million for stadium Unknown if land cost included (USD \$150M for complex)	<b>Capacity:</b> 27,000 (not expandable)	<b>Building Footprint:</b> 30,000m2	<b>Facility Operator:</b> AEG	<b>Key Uses:</b> MLS Soccer
---------------------------------	---	--	--	----------------------------------	--------------------------------

### Background and Facility Description

Opened in 2003, the Home Depot Center soccer stadium is the second soccer-specific soccer stadium to have been built in the U.S. The facility is located on the campus of California State University, Dominguez Hills on a 125-acre sports complex development run by AEG. The complex features not only a soccer stadium but also dedicated facilities for tennis, track and field, and cycling. It also accommodates volleyball, baseball, softball, basketball and other sports.

### Anchor Tenants and Key Uses

- Home Depot Center has two anchor MLS professional soccer tenants: Chivas USA and Los Angeles Galaxy.
- Also serves as soccer training headquarters for the United States Soccer Federation and men's and women's national teams.
- The defunct Los Angeles Sol (Women's professional soccer) previously played at the facility.
- The complex caters to both amateurs and high performance athletes. It is a designated U.S. Olympic Training Site and is the home of Athletes' Performance Los Angeles, but its tennis courts, soccer training fields, jogging trails and some of its fitness stations are also open to the public.
- The Stadium accommodates primarily soccer but has also hosted rugby, high school football and concert events.

### Amenities and Features

The Home Depot Center Stadium features:

- Natural turf
- 27,000 fixed seats
- 1,500 club seats
- 42 luxury suites, plus 6 event suites
- Overhanging Teflon roof
- 10 soccer training fields, including two artificial surface fields located adjacent to stadium
- 4,200 parking spaces

### **Capital Project Details**

- The Home Depot Center was developed and privately financed by AEG at a cost of \$150 million, of which \$87 million was devoted to the stadium.
- Land was contributed by California State University at Dominguez Hills, which retains development rights. The project to build a complex began with the University offering to rent out the campus soccer fields to the professional team LA Galaxy for practices. At the time, the team was considering building a soccer-specific venue and negotiations resulted in a 55-year lease.
- A 10-year \$70 million naming rights deal was struck with Home Depot which included calling for \$30 million in building materials to be purchased from Home Depot.

### **Facility Operations and Ownership**

The facility is operated by Anschutz Entertainment Group, which is also the ownership group of the LA Galaxy MLS soccer team.

**Operating Financials** - Information unavailable.

### **Partnerships**

California State University – Dominguez Hills provided the land for the facility. A joint-use agreement between AEG and California State – Dominguez Hills provides the University with a share of revenues from rent, parking and box office. The University also has access to facilities and job and internship opportunities for students.

### **Location and Surrounding Uses**

The Home Depot Center is located on the campus of California State University, Dominguez Hills in Carson, California, about 15 km south of downtown Los Angeles. The soccer stadium is part of a multi-sport complex, therefore it is adjacent to several complementary uses including a track and field facility, indoor velodrome, tennis stadium, 9 additional soccer training fields, and multiple tennis courts.

### **Lessons Learned and Issues in Multi-Usage (e.g. Field Convertability)**

Information unavailable.

### **vents Profile and Major Events Hosted**

The Home Depot Center averages 90 ticketed events each year with 45% being related to MLS soccer. In addition to MLS soccer games, in a recent year other uses included 10 additional soccer games, 2 rugby matches, 1 lacrosse game, one motorcross event, and 6 concerts. (Under an agreement with the community and California State University, the Home Depot Center may not have more than 6 concerts per year).

Past events held at the stadium have included:

- 2003 MLS All-Star Game
- MLS Cup Game (2003, 2004, 2008, 2011)
- 2003 FIFA Women's World Cup championship game
- Qualifying matches for Copa Libertadores
- CONCACAF Men's and women's gold cup matches
- Super Clásico, intra-city rivalry, Los Angeles Galaxy vs. Chivas USA
- Several international friendlies featuring teams such as Real Madrid, Club America, Chivas Guadalajara, Mexican National Team
- First three editions of International Rugby Board USA Sevens Tournament
- California State Championship Bowl games for high school football
- ESPN Summer X Games
- Hosted first two seasons of Spike TV's Pros vs. Joes reality sports contests
- Boxing Match Oscar De La Hoya vs. Steve Forbes

In addition major concert tours have included:

- Dave Matthews Band
- Carlos Santana
- Kenny Chesney
- Curiosa Festival featuring the Cure and Green Day
- Vans Warped Concert Tour

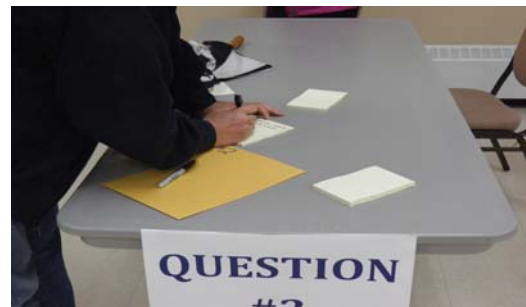
United States women's and men's national soccer teams use the facility for training camps and select home matches.

### **Other Information**

An estimated 1-1.5 million visitors came through the Home Depot Center in its first year of operations, and the facility generated an estimated 800 full and part-time jobs. The City of Carson recently negotiated receipt of revenues totaling \$280,000 annually from admissions fees collected at the Home Depot Center. The City of Carson also levies a hospitality tax which increased for several years with the opening of the Home Depot Center.

### **Information Source(s)**

Home Depot Center, City of Carson, California State University – Dominguez Hills.



# Phase 1 Stadium Analysis: Public Open House Summary

Halifax Regional Municipality

---

This page intentionally left blank

## Table of Contents

<b>1</b>	<b>OPEN HOUSE CONSULTATION METHODOLOGY .....</b>	<b>1</b>
<b>2</b>	<b>HOW WOULD YOU DESCRIBE AN IDEAL STADIUM FACILITY? .....</b>	<b>3</b>
2.1	RATIONALE FOR QUESTION .....	3
2.2	RESULTS .....	3
<b>3</b>	<b>HOW MIGHT YOU SEE THE FACILITY BEING USED BEYOND THE FIFA EVENT? .....</b>	<b>5</b>
3.1	RATIONALE FOR QUESTION .....	5
3.2	RESULTS .....	5
<b>4</b>	<b>WILL A NEW STADIUM IMPACT YOUR QUALITY OF LIFE? .....</b>	<b>7</b>
4.1	RATIONALE FOR QUESTION .....	7
4.2	RESULTS .....	7
<b>5</b>	<b>WILL A NEW STADIUM IMPACT THE QUALITY OF LIFE OF THE REGION? .....</b>	<b>9</b>
5.1	RATIONALE FOR QUESTION .....	9
5.2	RESULTS .....	9
<b>6</b>	<b>HOW COULD A NEW STADIUM BE ACCESSIBLE TO THE PUBLIC? .....</b>	<b>10</b>
6.1	RATIONALE FOR QUESTION .....	10
6.2	RESULTS .....	10
<b>7</b>	<b>GENERAL COMMENTS .....</b>	<b>11</b>

Appendix A: Open House Information Panels

Appendix B: Open House Meeting Feedback – Full Transcription

---

This page intentionally left blank

## 1 OPEN HOUSE CONSULTATION METHODOLOGY

Public open house meetings are an integral part of the Phase 1 Stadium Analysis for Halifax Regional Municipality. Phase 1 represents the initial business planning phase, the main objective of which is to understand the feasibility of a future potential stadium. The open house meetings represent one component of a larger community engagement strategy which includes social media communication through Facebook and Twitter as well as small group meetings and key informant interviews.

The social media component of the community engagement strategy was and continues to be used as a means to communicate and hear from the public using the world wide web. As at June 23, 2011, the Halifax Stadium Facebook Page ([www.facebook.com/halifaxstadium](http://www.facebook.com/halifaxstadium)) had a total of 154 monthly active users and the Halifax Stadium Twitter Page ([www.twitter.com/halifaxstadium](http://www.twitter.com/halifaxstadium)) had a total of 94 followers. It is expected that the online following of the stadium analysis project will grow if the project progresses.

The open house meetings provide a face-to-face method of interacting with the public, to hear and address questions and obtain feedback. During the week of June 6, 2011, a total of 3 public open house meetings in respect of the Phase 1 Stadium Analysis were held the Halifax Region. The objectives of meetings were as follows:

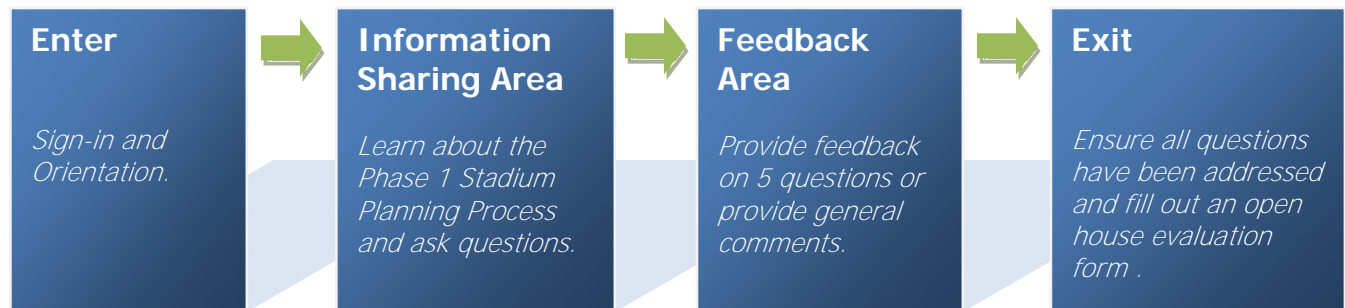
- To inform the public about the stadium project, the process, and where the open house meetings fit into the stadium process
- To clarify any aspects of the project for members of the public
- To address any questions of the project from members of the public
- To provide the opportunity for the public to offer opinion in favour or otherwise through targeted questions
- To obtain feedback from the public with regard to the potential feasibility of a new stadium in Halifax Regional Municipality

Meetings were well advertised through media releases, newspaper advertisements, radio advertisements, facebook and twitter. The following table summarizes the date, location and number of participants in each of the three open house meetings:

Open House Date	Open House Location	Number of Participants
Monday June 6, 2011	Maritime Hall at the Halifax Forum, Halifax	55
Wednesday June 8, 2011	Cole Harbour Place, Cole Harbour	24
Thursday June 9, 2011	LeBrun Recreation Centre, Bedford	14
<b>Total Public Participants</b>		<b>93</b>



Open house meetings were each arranged into four different areas where participants are invited to flow freely from various areas, but encouraged to participate in each of the areas in a linear manner. The four areas and their purpose are described in the exhibit below.



The open house format was selected as it provided the best means for information exchange to and from the public. The information panels displayed as part of the Information Sharing Area are included as Appendix A.

Participants were asked to respond to 5 questions in the feedback area and were given the opportunity to provide general comments. The following summarizes the rationale behind the development of each of the 5 questions, feedback received under each question as well as general comments received by theme.

The following comments are those of open house participants. Sierra Planning & Management is reporting these findings based on the meetings. Note that comments may be altered from their original form for reasons of clarity, readability, spelling and grammar. The findings and opinions contained herein should not be read as a reflection of the professional opinion of the consulting team engaged in the consultation exercise and in assessing the viability of the project, which remain ongoing.

A full transcription of feedback received has been included in Appendix B.

## 2 HOW WOULD YOU DESCRIBE AN IDEAL STADIUM FACILITY?

### 2.1 RATIONALE FOR QUESTION

Phase 1 of the stadium analysis does not touch specifically on design aspects of the facility, however, it is important to understand the various facility components which are envisaged or the uses which may be accommodated in the facility. For this reason, we have asked the public to describe their perception of an ideal stadium facility.

### 2.2 RESULTS

Theme	Sample Comments	No. of Responses & %age of Total Responses
Multi-Use	"A stadium with a multitude of uses", "it could accommodate several simultaneous uses", "indoor floor space", "Capable of hosting any number of events"	27(18%)
Facility Size	"large enough to attract National/International events", "mid-scale", "expandable", **Note that the majority of respondents indicated a need for 10,000-30,000 seat capacity	24 (16%)
Transportation	"easy access and parking for those coming from outside Halifax", "accessible via multimode - bikes, walk, bus, drive, etc. ", "good use of public transit", "close to Hub of Highways", "central & well connected to transit options"	20 (14%)
Location	"include development on the land that will help us pay for it such as upscale condominiums", "Shannon Park would be a good location", "central location - downtown would be preferable", "built near the Basin", "access to Downtown is key", "away from the downtown Halifax core"	17 (12%)
Expandability	"planning for future needs and not just needs of today ", "do not underbuild", "located where it can be expanded", "start smaller, but design to grow", "Give CFL and other organizations opportunity to expand"	10 (7%)
Weather Considerations	"covered areas (some) for weather", "over the field for winter field use", "Field turf rather than grass to extend use in our wet weather", "retractable roof to make it accessible year round"	10 (7%)
Funding/Cost	"paid by business people with their own money, not with taxpayers money", "facility should be cost shared", "sell community shares to raise money", "large initial investment will pay off in the future"	10 (7%)
Accessibility and Inclusivity	"it needs to be accessible for all communities", "available to all levels of and age groups of sport and culture", "Inclusive to low income families; persons with disabilities; external communities that can bring revenue to HRM"	8 (5%)
Building Quality/Design	"don't go the cheapest route", "Don't cheap out, quality, size appropriate, scalable, something to be proud of", "real seats not benches"	4 (3%)
Other	(see below)	17(12%)

#### Other Comments:

- Use SMU but important to utilize benefactors; expand facilities; make accessible
- Long-term vision of City and Province in mind - do not underbuild. HRM will be 500,000 in the area not too long from now; maybe combine with trade centre; sporting all events area as much about the spectacle as the sport design should take this into account
- Not a good idea at this time
- But do we need this now?
- I think you need 20-30 events a year; 50-60 would be perfect; events meaning sold out seats
- Track around perimeter
- Parkland/walking areas around
- Turf
- Retail and hotel
- Expand SMU stadium to 15,000 seats (more at later date if warranted); field is there, some parking is there now. McGill University's stadium was expanded in 2 phases. It is now home to Montreal Alouettes of the CFL; the tower and the new Homburg Centre provide complimentary facilities
- Make people feel it is their stadium "I own a piece of that"
- Temporary skating oval in winter; ice hockey surface
- Not limiting in design; track is fine
- Open air
- Partner with transit/military
- Sunken lower bowl
- Built only when it can be shown on average. High utilization rate. not for 10-20 events/year

### 3 HOW MIGHT YOU SEE THE FACILITY BEING USED BEYOND THE FIFA EVENT?

#### 3.1 RATIONALE FOR QUESTION

An important component in the development of the business case for the stadium facility is the legacy potential of the stadium and its viability after hosting of the 2015 FIFA Women's World Cup event. The stadium business case assumes that an anchor tenant would not occupy the facility immediately following the FIFA event, rather, community-level usage and local, regional and national events and competitions would anchor the facility.

#### 3.2 RESULTS

Theme	Sample Comments	No. of Responses & %age of Total Responses
Events	"important to appeal to Non-sporting audience", "cultural events, fairs, markets, community gathering space, general recreation activities", "trade shows", "Community events", "special speakers"	27 (20%)
Concerts	"concerts large or small", "concerts!"	24 (18%)
Community Sports	"high school sports; college football; city championships; Provincial championships", "local sporting events", "school events", "Maximize community access and multi-use"	18 (13%)
Professional Football	"CFL; more soccer (Canadian National Team Games); Vanier Cup; Uteck Bowl", CFL Events", "10th CFL franchise; Grey Cup Game if the stadium is built right"	17 (13%)
University/College	"university football", "university sports", "provincial championships (and greater)"	11 (8%)
National and International Events	"national, international sports events", "Olympics"	7 (5%)
Professional Soccer	"MLS", "Professional soccer"	7 (5%)
Sport Tournaments	"large tournament and events whether soccer, football, music, religious, etc..", "Major sport tournament"	3 (2%)
Winter Use	"skating and speed skating; venue in winter", "artificial ice, synthetic ice, plan for off season"	3 (2%)
Other	(see below)	18 (13%)

## Other Comments:

- Stadium needs to be able to be used by all citizens after FIFA needs to be cost effective. Corporate funds and let it pay for itself
- Forget FIFA; that's a one-week event. You don't build a stadium for a one-week event. If your business plan is based on FIFA or any upcoming event, it is a lousy plan
- Recreation programs in wellness, physical activity, intro level sports, arts and culture, drama, dance, music, the list is endless
- Wellness center. Physiotherapy center, nutritional counselling, leisure counselling, chiropractors, acupuncturists, naturopathic doctors, sports medicine clinics, spas as well as other private enterprise
- Meeting/gatherings
- Track and field centre of excellence
- Possibly expand and incorporate into "Metro Centre II" or incorporate a convention centre/Hotel complex
- Football Stadium; baseball stadium; session stadium
- Military shows
- Regardless of the physical attributes of the Stadium, do not neglect the potential use of the parking facility for the community e.g. motorcycle training, bicycle rodeos, driving skills
- Multi-use
- Parking area could be used as a public transit hub (i.e. 3rd ferry terminal, bus, rail, etc.)
- This is a good question. The need should be determined before any government investment
- outdoor hockey
- Ensure facilities are designed for Multiple Sports incl. Tennis/Track/Velo, etc.
- Must be used to sustain itself, i.e. operationally not cost to taxpayers

## 4 WILL A NEW STADIUM IMPACT YOUR QUALITY OF LIFE?

### 4.1 RATIONALE FOR QUESTION

The perception of how a potential stadium may change the quality of life of individuals, whether negatively or positively is an important measure of public sentiment towards the project. The question also provides an opportunity for the public to reflect on how a stadium may impact their lives individually.

### 4.2 RESULTS

Theme	Sample Comments	No. of Responses & %age of Total Responses
<b>Economic</b>	"economic employment and taxes", "huge part of attracting sought after workers to NS", "Will bring a lot of money to Province", "Tourism!!", "opens developmental opportunities to Halifax"	20 (24%)
<b>Social Cohesion</b>	"Bring myself/family closer to this community", "expanded opportunities for community gathering, celebrations, extravaganza's or rallies", "Family outings"	14 (16%)
<b>Fitness</b>	"More fitness opportunity", "opportunities for children and youth to be involved in sport and recreation", "promotes health lifestyle and community togetherness"	13 (15%)
<b>Pride/reputation</b>	"This stadium is a visible symbol that HFX and NS are moving up. ", "help to build civic pride", "Greater national exposure", "Put Halifax on a National & Global scale; puts us finally on the Map"	13 (15%)
<b>Cost concerns</b>	"There is only so much \$ and plenty of needs in the existing sports facilities", "Just another thing we can't afford", "I can't handle a raise in taxes"	5 (6%)
<b>Negative impact</b>	"too costly as all other project have been", "a stadium has no benefit to me", "no impact on me personally unless"	6 (6%)
<b>Positive impact</b>	"Does Halifax need a decent facility? Of course!!", "project will benefit many across the province"	3 (4%)
<b>Other</b>	(see below)	12 (14%)

#### Other Comments:

- FIFA World Cup female event = great to support Female sport
- Entertainment opportunities
- A larger venue may attract sports and entertainment events that I might not otherwise be able to enjoy
- Taxes might go up (but that's OK) may be a chance to see events/games we normally don't see (even in the fog!), may consider going to a concert! (would not go to Halifax)
- Schools (HRSB) and French school board could promote an agreement for reciprocity of use. Every year, every child could try a new sport or see a professional team play an exhibition
- I would attend events of interest to me
- Will have an effect if: can use/book the facility for events at a "reasonable" cost; hold events I would pay to see -a big ticket bands/concerts
- Events in stadium give people of a new interests
- To really impact my quality of life, I want to see what is: 1. usable 2. accessible 3. Vibrant
- Additional entertainment option
- Entertainment
- Make sure coast to coast tours don't stop at Moncton

## 5 WILL A NEW STADIUM IMPACT THE QUALITY OF LIFE OF THE REGION?

### 5.1 RATIONALE FOR QUESTION

The perception of how a potential stadium may change the quality of life of the region, whether negatively or positively is an important measure of public sentiment towards the project. The question also provides an opportunity for individuals to consider regional impacts of a potential new stadium.

### 5.2 RESULTS

Theme	Sample Comments	No. of Responses & %age of Total Responses
<b>Economic</b>	"Economic Benefits, employment benefits, construction and operational spin offs to other business in HRM where events held",	21 (42%)
<b>Pride/Reputation</b>	"think big; we're not a little City any longer", "Raise profile of HRM on National, International stage.", "High profile events will completely change the way we and the rest of the county see our own City"	10 (20%)
<b>Social</b>	"better community spirit, particularly downtown at time of use or game", "community spirit"	5 (10%)
<b>Fitness</b>	"a facility that encourages participation in sport", "Venue for youth sports and has a positive effect on health and wellness"	4 (8%)
<b>Cost Concerns</b>	"Majority of HRM citizens would have no need for the stadium and therefore would only fee the impact of higher taxes", "Will impact taxation of citizens if not operationally and feasible"	4 (8%)
<b>Positive Impact</b>	"yes big time"	2 (4%)
<b>Other</b>	(see below)	4 (8%)

Other Comments:

- As one of the last provinces without a stadium it is imperative that the feds join us in this adventure; public access for limited use is necessary
- Not really. It just moves \$ around. IF I go to an event there, it means I'm not going to a restaurant, movie, other. Only if there is significant incremental draw from outside NS will the Province have incremental tax and economic impact
- Yes if we have a sports team that played there that could sell tickets for 15K and crowd
- Stadium should be located for convenience of patrons using it located at junction of main highways (i.e. Bedford Rifle Range, Hammonds Plains Rd)



## 6 HOW COULD A NEW STADIUM BE ACCESSIBLE TO THE PUBLIC?

### 6.1 RATIONALE FOR QUESTION

It is envisaged that community-level usage and local and regional events and competitions would anchor the facility immediately following the 2015 FIFA Women's World Cup event. Opinion and ideas on how to create an accessible environment for the general public are important to understand from potential users, participants and spectators to the facility.

### 6.2 RESULTS

Theme	Sample Comments	No. of Responses & %age of Total Responses
<b>Car Access/Parking</b>	"needs to be built around public transit and good road and parking", "ample free parking", "priority parking for hybrid/green/electric vehicles"	16 (21%)
<b>Other Transportation</b>	"allow for access by: highways, transit (potentially run special shuttles during games, events) via harbour, ferries, allow for biking in the future", "encourage car pooling", "next to major transit routes (ferry, highway, roads); public transit"	15 (20%)
<b>Location/Site</b>	"put in the right place! Easy access from the highway/no ads/metro transit", "if the stadium is built a Shannon Park then the waterfront could be developed c/w Ferry and transit hub"	11 (15%)
<b>Community Use</b>	"Target families. Target new Canadians, target youth, target schools", "accessible to public"	11(15%)
<b>Affordability</b>	"opportunity for inexpensive seating", "rentable at a "reasonable" price to small community groups and small sporting events"	7 (9%)
<b>Multi-Use</b>	"Sport and non-sport use", "multi-functional"	4 (5%)
<b>Mobility Access</b>	"needs to be easily accessible for the disabled"	3 (4%)
<b>Other</b>	(see below)	11 (15%)

Other Comments:

- Audience Protected from weather/comfortable
- Make it welcoming, open, vibrant and non-intimidating
- Paying tenants; priority #1
- Off event room use non-profit NGOs, weekly community meetings; health events/clubs
- Accessible by hosting events by becoming representing the City and Region; i.e Potential tenants, pro sports, CFL an CIS events
- Have a portion feasible for nearly full-time use; eg a portion for some sort of permanent local market or activity (crafts, education)
- Free events
- Make the stadium a symbol of our city and province
- Concerts
- CFL Football
- Future Sporting Events - CWG; FIFA; Vanier Cup

## 7 GENERAL COMMENTS

---

Participants of the open house meetings were asked to respond to 5 specific questions developed by the consulting team and the HRM Community Engagement Team. Comments, opinions, ideas or sentiment which could not be captured in responding to the 5 questions were welcomed in a general comments section. General comments received are summarized below. A transcription of the full comments are included as part of Appendix B:

In Favour/Positive	Not in Favour/Concerned
<ul style="list-style-type: none"> <li>• Support female sports e.g. FIFA; Support for soccer = more welcoming community for immigrant populations</li> <li>• This project must be delivered as a good-for-everyone facility. Not only HRM, but the Province and the entire Maritimes</li> <li>• Thanks for holding this forum/open house. Engage more people to educate and get public support</li> <li>• Don't build too small, build for the future</li> <li>• Just build it</li> <li>• Build it bigger than we need the will be 1/2 million people here in the next 20 years</li> <li>• Grey Cup in Halifax would be awesome</li> <li>• Stadium would be a good investment for our City (health and social, etc.); more impact on the positive for us that convention centre; local - Shannon Park</li> <li>• Creates Jobs</li> </ul>	<ul style="list-style-type: none"> <li>• Don't sacrifice the stadium for other project</li> <li>• Not one penny of taxpayer's money should be invested in this</li> <li>• This is a want, not a need</li> <li>• Not Exhibition Park Area. Terrible accessibility</li> <li>• I do not support the stadium project, and I feel HRM is not in a good financial position to fund such a project. In better times, financially, for HRM, this might be a worthwhile project, but not now</li> </ul>
Other	
<ul style="list-style-type: none"> <li>• Stadium should be put on Dartmouth side either Shannon Park or Brightwood Golf site</li> <li>• Make it modular so it can be added to in the future</li> <li>• Let's avoid some of the mistakes made in the Commonwealth bid</li> <li>• Track Support, or lack thereof, by age range to gauge support for the project in 10-15 years once baby boomers are retired</li> <li>• 20,000 seats central location so it is very accessible</li> <li>• Suggest wanders grounds; job in Bell rd. to accommodate</li> <li>• Mid-size stadium requires anchor to mount</li> <li>• Build public consensus through media/facebook/etc. on an ongoing basis</li> <li>• Should not be dependent on auto traffic to reach stadium</li> <li>• Shannon Park would be a reasonable site</li> <li>• Remember other aspects of the complex could be used by the community for special projects motorcycle and driver education community markets etc. not just a stadium but the parking lot too</li> <li>• Private Sector must come to the table and Halifax will build it</li> </ul>	

# Appendix A

---

## Open House Information Panels

---

This page intentionally left blank

# Halifax Regional Municipality Stadium Planning Process



WE ARE HERE

## Phase 1

\*Opportunity for Public Input

### Stadium Consultation & Business Planning

Community Engagement

Feasibility Assessment

Facility Programming & Event Hosting Potential

Preliminary Cost Estimates



COUNCIL APPROVAL REQUIRED TO PROCEED TO NEXT PHASE

---

## Phase 2

\*Opportunity for Public Input

### Consultation, Site Selection & “Building” Program



COUNCIL APPROVAL REQUIRED TO PROCEED TO NEXT PHASE

---

## Phase 3

Construction

# What is Phase 1 of the Stadium Planning Process?

The HRM Stadium Process is divided into three phases. We are currently in Phase 1 of the process, known as the Stadium Consultation and Business Planning Phase.

## The Central Question of Phase 1

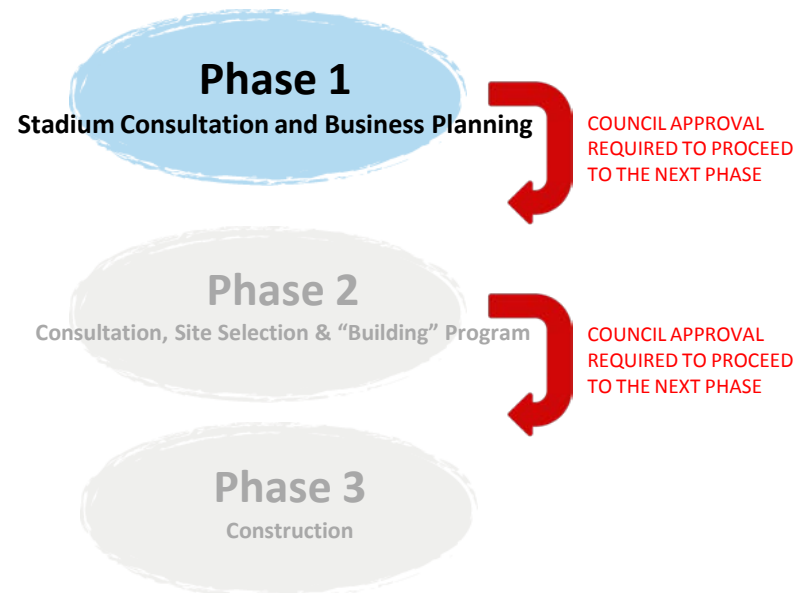
*Can a facility be developed which both meets the needs of the FIFA 2015 Women's World Cup and provides a sustainable legacy of uses after the event?*

In answering this question, the business plan will address all of the related questions of scale, amenities, core/main function, multi-use and ancillary development with a comprehensive business planning and financial feasibility analysis – including input from citizens, sport and recreation groups and potential partners.

The precise form, function of the facility, and community mandate has therefore yet to be determined but will be an outcome of the business plan.

## Timelines

Phase 1 of the study is expected to be complete in August 2011. If a sustainable business model can be developed that meets with Council approval, Council would then determine if HRM will move on to Phase 2.



# Why Are We Undertaking This Process?

There has been significant interest and some attempts over the past 20+ years to construct a sport stadium in the Halifax Region. Most of these discussions have been tied to bids to host major sport events, and in some cases, related to opportunities tied with positioning for a Canadian Football League team.

In March, 2011, Canada was selected as the host country for the FIFA 2015 Women's World Cup. Halifax Regional Municipality is currently one of seven potential host cities for the games.

As a result, HRM Council has requested that the required consultation and business planning take place, to determine whether or not there is long term viability in the construction and operation of a venue to meet the FIFA requirements.



# What is the FIFA 2015 Women's World Cup Opportunity?

FIFA announced on March 3, 2011 that Canada was selected as the host country for the 2015 FIFA Women's World Cup.

The Canadian Soccer Association (CSA) will now be seeking between four – six cities across the country to host the games. Halifax is one of seven cities which has shown interest in bidding to stage the games.

A host city is required to provide an outdoor venue with a minimum seating capacity of 20,000, which can include a mix of temporary and permanent seating.

## ***Definitions***

***FIFA*** : *Fédération Internationale de Football Association (FIFA) is the international governing body of association football.*

***FIFA Women's World Cup*** : *The international women's football (soccer) world championship tournament held every 4 years. The next competition will be held in Canada in 2015. 24 teams will compete in the tournament.*

## **Seven Potential Host Cities:**

- ❖ Halifax Regional Municipality
- ❖ Edmonton
- ❖ Montreal
- ❖ Vancouver
- ❖ Winnipeg
- ❖ Ottawa
- ❖ Moncton

# What Scale of Stadium is HRM Considering?

## National-Brand Facilities

Multi-sport / Multi-tenant  
50,000+ seats  
Capable of holding large, national scale events

*Examples Include:*

- Rogers Centre (Toronto)
- B.C. Place (Vancouver)
- Commonwealth Stadium (Edmonton)



## Mid-Scale Facilities

10,000-30,000 seats  
Most have an anchor tenant  
Lower scale (10,000 seats) generally no tenant  
CFL-anchored stadia are larger  
Soccer –specific stadia are smaller

*Examples Include:*

- Ivor Wynne Stadium (Hamilton)
- McMahon Stadium (Calgary)

*Soccer -Specific Examples Include:*

- BMO Field (Toronto)
- Saputo Stadium (Montreal)

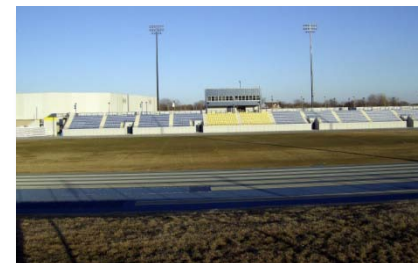


**Halifax Regional Municipality is considering a  
mid-scale facility with community-use components**

## Community Facility

Less than 10,000 seats

Many communities, schools, colleges & universities have fields with permanent seating. Quality, scale of seating and amenities vary greatly.



# Frequently Asked Questions

## **If a stadium was built, who chooses where it would be situated?**

Site specific considerations will be analysed through the Phase 2 Consultation, Site Selection and “Building Program.” Site specific suggestions or principles that are discovered in any of the Phase 1 Consultation and Business Planning Analysis will be referred to Phase 2.

## **How much would a stadium cost?**

The answer to this question will be developed in Phase 2 of the analysis. The study would look at that time at ensuring that any approved project is the right size facility for the right purpose. It would be premature to suggest at this time what any yet-to-be-proposed project might cost.

## **Will there be other opportunities for community engagement?**

We are in the first phase of a three phase project. Upon completion of Phase 1, Halifax Regional Municipal Council will decide whether or not to continue onto Phase 2. Additional opportunities for community feedback are an important part of Phase 2.

*Please proceed to answer the questions in the feedback area.  
A facilitator is available to assist you, if needed.*

# Appendix B

---

**Open House Meeting Feedback  
Full Transcription**

---

This page intentionally left blank

## OPEN HOUSE LOCATION: HALIFAX

### Q1 - HOW WOULD YOU DESCRIBE AN IDEAL STADIUM FACILITY?

- Use SMU but important to utilize benefactors; expand facilities; make accessible;
- Expand SMU stadium to 15,000 seats (more at later date if warranted); field is there, some parking is there now. McGill University's stadium was expanded in 2 phases. It is now home to Montreal Alouettes of the CFL; the tower and the new Homburg Centre provide complimentary facilities;
- New facility close to Hub of Highways; 20-30,000 people; multi-use that is concerts events, sports open air;
- sell community shares to raise money (not just corporate sponsorship);
- Make people feel it is their stadium "I own a piece of that";
- Easily expanded to 25,000 permanent seats; capable of expanding to full CFL size in future; hence modular design; no track; want good experience for soccer and football;
- 25,000 permanent seats (CFL); capable of expansion to 50,000 (end zones); partial roof; club boxes etc. to be added at later date; partner with transit/military; no inner tract 60-80 million;
- built in area that the facility could be enlarged as use expanded (i.e. portable Sections);
- Field turf rather than grass to extend use in our wet weather;
- Close to water; close to downtown (Dartmouth or Halifax) such as Shannon Park site; versatile enough to attract CFL and be useful to University Sports;
- Inflatable dome to allow use in winter; walking/transit/ferry access to downtown;
- A great facility has a great atmosphere; BMO in Toronto; Montreal's CFL Stadium; Vancouver's Commonwealth; Burnaby's Swanguard; Need 10-30,000 seats - Likely 15-20;
- 100% privately funded, geared to multiple events;
- Think and build for the future use; 30,000 seats expand to 50,000; roofed for poor weather; keep cost under 80 million;
- No Track, Halifax Stadium Mould; 25-30,000 permanent sets with open enclosed zones to expand to 45-50,000 with temporary seating; a two tier stadium with sky bikes, VIP Club Lounges & seats, restaurants, permanent washroom and concession stands with open concourses concrete built with steel;
- Temporary skating oval in winter; ice hockey surface;
- Not limiting in design; track is fine; don't put it in the middle of nowhere - access to Downtown is key;
- Self-sufficient with a professional sports team or it will not survive;
- If possible, indoor floor space. Our school and community centre gymnasiums are maxed out for house league indoor sports. Really hard to get time at reasonable hours; please try to include development on the land that will help us pay for it such as upscale condominiums - something that unlike our new library won't take business away from those already in the area.

Empty building aren't pretty. The Dartmouth shopping Centre struggles as it is. Responsible development; indoor tennis, badminton, volleyball, racquetball courts needed;

- Halifax a major 90 to 100 million plus stadium minimum; cape and point and stadium is a bigger project than a \$60 million library;
- Centrally located within Halifax City Core; located next to/near multiple modes of transport. IF at Shannon Park could have another ferry stop, highway (cars, bus, etc.); seating for 15,000 or more;
- Planning for future needs and not just needs of today;
- Serious coordination with public transit; flexible for as much use as possible by different organizations; at least 20,000 permanent seats;
- Keep in mind the potential use of parking infrastructure for multi-use; i.e. restaurants bicycle rodeos, karting, driving skills events;
- Mid-scale: 20-25,000 multi purposes; available to all levels of and age groups of sport and culture;
- Should be located Shannon Park or Mainland Common for easy access for out of town people;
- Must be 25,000 seats for CFL expandable to 45,000 for Grey Cup;
- 30,000 seat; sunken lower bowl; downtown area / Dartmouth;
- Medium size; approx. 20,000 capacity; multi-sport; multi-use e.g. Concerts, festivals; athlete/participant accommodations close by;
- Min. 15,000 seats and expandable; no tract; partially covered; ASAP;
- Under 20,000 seats and designed to maximize community and multiple uses; CFL team is a pipe dream - don't even consider it;
- Stadium should be built near the Basin; Min. 25,000 seats; Give CFL and other organizations opportunity to expand; retractable roof to make it accessible year round; large initial investment will pay off in the future;
- Stadium should be built near the Basin;
- 15-20,000 seats; temp & perm expandable to 40-50,000 (long-term vision); multi-use (football, track, concrete, etc.); central & well connected to transit options; not an "only by: car local in the burbs; built only when it can be shown an average. High utilization rate. not for 10-20 events/year;
- 25-30,000 seats; partially covered; multi-purpose; long-term vision of City and Province in mind - do not under build. HRM will be 500,000 in the area not too long from now; maybe combine with trade centre; sporting all events area as much about the spectacle as the sport design should take this into account; easy access and parking for those coming from outside Halifax.

## **Q2 - HOW MIGHT YOU SEE THE FACILITY BEING USED BEYOND THE FIFA EVENT?**

- CFL; outdoor hockey; track and field events; baseball/minor league; concerts; outdoor trade shows; professional soccer;
- High school sports; college football; city championships; Provincial championships;
- CFL Football; Vanier Cups; Concerts; track meets; soccer; trade shows;
- CFL;

- 10th CFL franchise; Grey Cup Game if the stadium is built right; major concerts;
- Football Stadium; baseball stadium; session stadium; concert hall; bingo events; tennis matches; school events;
- Maximize Community; access and multi-use; venue for a variety of high school and university sports?
- Less glitz - more practicality;
- CFL; more soccer (Canadian National Team Games); Vanier Cup; U-track Bowl; Local sports;
- Build on many International/National Sporting Events; Concerts; Large Festivals/Ceremonies; Ensure facilities are designed for Multiple Sports incl. Tennis/Track/Velo, etc.;
- Don't pigeon hole facility and future/current user by building for FIFA only; why use FIFA for justification of this stadium - is Soccer not popular in Canada compared to CFL/NFL football; concerts, tradeshow CFL/NFL???
- Military shows; motocross shows; concerts; Olympics;
- CFL expansion; MLS expansion; Vanier Cup; Major Concerts; Provincial/National Championships;
- Requires Track - World University Games; World Masters Games; Gay Games; World Masters Track and Field; Tattoo;
- Regardless of the physical attributes of the Stadium, do not neglect the potential use of the parking facility for the community e.g. motorcycle training, bicycle rodeos, driving skills
- CFL; concerts; trade shows; local sports; community affairs; fairs, etc.;
- MLS; CFL; Community events; lacrosse; track; university sport; provincial championships (and greater);
- Community fundraisers (relay for life);
- Multi-sports facility; CFL university, minor football; track and field; soccer; events; trade shows;
- CIS Football; CFL football; concerts; trade shows; pro soccer; other rentable events;
- CFL; MLS; CIS;
- Potential Winter Uses - put a temporary dome/tent structure on playing surface (like Rocky Lake rink?) for indoor soccer or hockey or football practices; put 2-3 outdoor hockey rinks (with boards); marry it with a hockey facility (like Boston College Stadium); make sure it can handle concerts, different sports; temporary shelters for practices in winter;
- Multi-use; local sports events; concerts; you name it;
- Parking area could be used as a public transit hub (i.e. 3rd ferry terminal, bus, rail, etc.);
- This is a good question. The need should be determined before any government investment.

### **Q3 - WILL A NEW STADIUM IMPACT YOUR QUALITY OF LIFE?**

- Imagine the grey cup here; the venues the stadium attracts would inspire our youth and provide angle found venue for sports entertainment we have never had; This City and Province are in stagnation. This stadium is a visible symbol that HFX and NS are moving up. We need things that will attract and keep our young and working people here;
- Will have an effect if: can use/book the facility for events at a "reasonable" cost; hold events I would pay to see -a big ticket bands/concerts;
- Events in stadium give people of a new interests;



- Community space to encourage more educational and social use especially the parking area. Local markets, driver education, etc.;
- Bring myself/family closer to this community; additional entertainment option; give kids incentive to participate and the attitude "maybe I can";
- From an entertainment level also affect overall quality of life for all of City;
- Quality of life maybe. But not if it means an increase in my property taxes or a reduction in current valued services. It has to have its own stand-alone business case. Not another sink whole of taxpayers money like the sky dome initially was;
- I would make our City a better place to live; sense of pride; economic benefits of sports events i.e. NHL outdoor classic - why not?
- No;
- To really impact my quality of life, I want to see what is: 1. usable - in use 365 days/year; 2. accessible - prices within range, different events; 3. Vibrant - a fun, safe, exciting place to be;
- Hopefully yes: sports and healthy living education for general population; entertainment; influx of \$ to community; instigation of future growth opportunities;
- A question is what will not be funded if HRM invests in this facility. There is only so much \$ and plenty of needs in the existing sports facilities;
- Social life and sense of community; think like a big City should;
- Just another thing we can't afford; CFL - you're dreaming - who is the potential owner of that franchise? Stop the foolishness "NO WAY";
- Huge Quality of life improvement. Having a stadium, performing arts etc. is huge part of attracting sought after workers to NS;
- Will bring a lot of money to Province. Revitalize areas of town; Tourism!! More money for province e.g. Education, Health; Create jobs;
- Create possibilities for international events; make surf coast to coast tour don't stop at Moncton;
- Yes! Anytime someone attends a great sporting event it impacts their life....inspiring, exciting, and creates memories with friend and family;
- Unlike the proposed convention centre, this project will benefit many across the province;
- With health/social etc. impact plus but depends on money resources available; able to afford it?
- Yes if events are held at the stadium - I will go to them - increased social events and experiences; also opens developmental opportunities to Halifax;
- Yes people will come visit me for an event. That is in MTL/TO/and Halifax but we have that communal feel, knowing we can have larger events will keep me living and paying taxes here;
- Even though I have a great job, don't own a car, TV or cell phone, and watch my spending, for the first time in my life (50 years) I've had to seek overdraft protection. I can't handle a raise in taxes. I already have everything I need in Lower Sackville. I wouldn't be visiting a Stadium;
- My taxes will increase to pay to feed another White Elephant;
- Put Halifax on a National & Global scale; puts us finally on the Map.

#### **Q4 - WILL A NEW STADIUM IMPACT THE QUALITY OF LIFE OF THE REGION?**

- Yes such a facility would be very conducive to bringing people from all parts of the HRM, etc. together as a group and especially in the summer months;
- Yes if events are held that people want to go to Halifax will be known as a center that can bend does host quality events/interesting events;
- Social and economic benefits; think big; we're not a little City any longer;
- Stop losing opportunities to competing areas; potential to spur the growth ops; attracts large events - Maritimers are willing to travel for fun;
- Yes - will attract more opportunities and people to Halifax and surrounding areas;
- It could take resources from other core mandate areas and needs;
- Yes big time; major stadium will be used and supported by all the region, there is 560 thousand people within this half of the City;
- Economic and Social team members and support staff living and working in the City;
- Not really. It just moves \$ around. IF I go to an event there, it means I'm not going to a restaurant, movie, other. Only if there is significant incremental draw from outside NS will the Province have incremental tax and economic impact;
- Yes if we have a sports team that played there that could sell tickets for 15K and crowd;
- Lots of people leave the Maritimes to attend large sporting events. This stadium will provide an opportunity for us to spend this time and money our own area;
- Yes a general proactive suggestion of being a major city;
- Will re-energize the City; add to the positive vibe; show the County we can punch at and above our weight; we do events well;
- Yes if CFL; community spirit; national presence;
- Stadium should be located from convenience of patrons using it located at junction of main highways (i.e. Bedford Rifle Range, Hammond's Plains Rd);
- The taxes and economy it generates over a 30-year period would justify the cost. High profile events will completely change the way we and the rest of the county see our own City;
- Yes will draw people into the core areas and help build and strengthen economy;
- Greater awareness of Halifax by rest of Canada/North America could bring more business, leading to more population and better Quality of life long-term.

#### **Q5 - HOW COULD A NEW STADIUM BE ACCESSIBLE TO THE PUBLIC?**

- Accessible by hosting events by becoming representing the City and Region; i.e. Potential tenants, pro sports, CFL an CIS events;
- Public transit; parking; access from main routs; free events; make the stadium a symbol of our city and province;
- Have a portion feasible for nearly full-time use; e.g. a portion for some sort of permanent local market or activity (crafts, education);
- High school football; school track meets; concerts; civic barbeques; CFL Football; Collegiate Sports; Future Sporting Events - CWG; FIFA; Vanier Cup;

- Needs better transportation opportunities (buses, etc.) don't put in the middle of nowhere; opportunity for inexpensive seating;
- Should be on the outskirts of Halifax or Dartmouth to eliminate parking problems. Must be accessible;
- If near the waterfront i.e. Dartmouth then access via ferry;
- Integrate stadium location into future public transit system;
- Accessible to public; desperately needed venue for high school athletics; keep pricing reasonable for local athletic events; donate seating to special groups request;
- If the stadium is built a Shannon Park then the waterfront could be developed c/w Ferry and transit hub;
- Uses - including multi-purpose areas (meeting rooms); transit - pick Shannon Park as a location, highway system, proximity to Downtown, potential ferry docking;
- Connection and visibility to the street; convenient location with good access (transit, walk); good events at good prices to give reason to come;
- Next to major transit routes (ferry, highway, roads); ample free parking; wheelchair accessible scooter accessible; public, transit; priority parking for hybrid/green/electric vehicles; rentable at a "reasonable" price to small community groups and small sporting events Halifax ultimate;
- A good question own would expect it to be accessible to a small group and others will be forced to pay for it;
- Designate days for community events (sports days, exhibitions, markets, expos);

#### **GENERAL COMMENTS**

- Track Support, or lack thereof, by age range to gauge support for the project in 10-15 years once baby boomers are retired;
- This is a want, not a need. There is a time to invest in needs and a time to invest in wants. The current economic climate is uncertain. Taxes are already too height and HRM picture is uncertain. Increasing taxes to fund this is a poor approach that could harm HRM more than help it. HRM has many needs to finalize and big projects to fund: time for the private sector to come forward, lead and fund this initiative if needed and wanted;
- Thanks for holding this forum/open house. Engage more people to educate and get public support;
- Don't build too small; build for the future; build to lease out to future events and sports owners and teams; make it just nice enough to attract the ticket buying public;
- 20,000 seats central location so it is very accessible;
- Plan how this stadium is to be built and used now and for the future potential size of Halifax; plan for multi-mode access to facility. In future gas will be very expensive;
- Suggest wanders grounds; job in Bell rd. to accommodate;
- Mid-size stadium requires anchor to mount. Children are the egg; Stadium and anchor (CFL) situation;
- Build public consensus through media/Facebook/etc. on an ongoing basis;
- Just build it;

- Build it bigger than we need the will be 1/2 million people here in the next 20 years. Not Shannon Park; on the Halifax side of the Harbour somewhere;
- Should not be dependent on auto traffic to reach stadium;
- Grey Cup in Halifax would be awesome; 100 million? Input into economy; sure to get a grey cup as a welcome to CFL;
- Not Exhibition Park Area. Terrible Accessibility;
- Shannon Park would be a reasonable site;
- Remember other aspects of the complex could be used by the community for special projects, motorcycle and driver education community markets etc. not just a stadium but the parking lot too;
- Stadium would be a good investment for our City (health and social, etc.); more impact on the positive for us that convention centre; local - Shannon Park;
- Creates Jobs - during build and maintenance of facility; development of amateur Sport in the Region;
- Private Sector come to the table and Halifax will build it.

## **OPEN HOUSE LOCATION: COLE HARBOUR**

### **Q1 - HOW WOULD YOU DESCRIBE AN IDEAL STADIUM FACILITY?**

- Facility should be mid-size; facility should be cost shared - all three levels of government for capital costs; Operational costs - should not cost taxpayers - i.e. should generate enough revenues to sustain itself; should be multi-purpose to enable all ages to use;
- Multi-use; all weather; easily accessible - central; good use of public transit - easy in/out;
- Inclusive to low income families; persons with disabilities; external communities that can bring revenue to HRM;
- Accessible i.e. transit needs; if Shannon do the previous work up re Ferry to Halifax/Bedford; Multi-use: pro/non-pro/public; parking near stadium; covered areas (some) for weather; track around perimeter; parkland/walking areas around;
- An ideal stadium is one paid by business people with their own money, not with taxpayers money;
- A stadium that is multipurpose; large enough to attract National/International events (sporting and otherwise); able to be converted to several (or some) smaller venues that could house or host smaller regional or local or ongoing community recreation oriented activities. A Stadium that is "creative in build" in that it could accommodate several simultaneous uses including recreations, sport, cultural, artistic and space for community gathering - celebrations, special events, fairs, etc. Ideally a low overhead that doesn't overly burden the tax base;
- A stadium with a multitude of uses - think about the future! That also means to be wary of the money;
- Easy access for Halifax/Dartmouth as well as out of town fans; hopefully dome roof; Multi-functional; must be a destination place so need to have other attractions;

- The new stadium would require a lot of space to be put on and parking and shuttle services.  
Zino Wise - 18 months depending on the weather;
- Multi-use - soccer, football, track and field, maybe incorporate an ice surface; central location - downtown would be preferable (close to all amenities, draw people to Downtown for events); sealable - start smaller, but design to grow;
- Covered to allow for all year use;
- It should be able to host various events between for example 10,000 eating up to 50,000 and for larger events; constructed so that access within stadium is restricted based on size of event being staged; stadium should be made available to all to use based on set usage rates; we need to work with the other Provinces (NB and PEI) one stadium to be used by all 3 Provinces;
- Capable of hosting any number of events - concerts (alternative to commons), temporary events (Rodeos, tractor pulls, etc.); sports teams (football, soccer);
- Modest in design and cost;
- Rectangular venue for concerts and events; parking; 25,000 seats or more; turf; good access (locally and within the Region);
- Mid-scale - 10-30,000 seats; capable of holding major events such as soccer, track and field, football, also concerts and handy to buses and ferries to and from;
- Seating - 25,000; multi-use; individual seating; expandable; community available;
- Modular design so that it can be temporarily expanded for larger events; located with plenty of parking and easy access to highways;
- Multi-purpose; 25,000 seats; expandable; retail and hotel;
- I strongly feel this facility would bring most benefit to the community if it were located downtown. It could become a centrepiece, drawing people Downtown. Parking and traffic flow would be an issue, but coordinating public transit from outlying designated parking areas could solve that problem and add to the experience (when major events are held). Could also take advantage of Parking facilities at Scotia Square, Purdy's, etc.;
- A great location would be on the Dartmouth side of the bridge (Shannon Park) where the old military buildings are. Ideal location, easy access.

## **Q2 - HOW MIGHT YOU SEE THE FACILITY BEING USED BEYOND THE FIFA EVENT?**

- Must be used to sustain itself, i.e. operationally not cost to taxpayers; CFL events - University and College events, music events, large tournament events whether soccer, football, music, religious, etc., miscellaneous i.e. Community yard sales and festivals etc.;
- Amateur sports; meeting/gatherings, multi-cultural events, music/pro-indie, local; religious? Trade shows;
- Circuses (Cirque de Soliel), concerts, must make sure it is used/programmed well;
- CFL; MSL; University; concerts; trade shows; international track meets, motocross events;
- Major sport tournament - CFL, conventions, concerts, University sports, cultural events, fairs, markets, community gathering space, general recreation activities;
- Baseball, soccer, football, track, concerts; must be as multi-use as possible. Cannot build to host 1 event type;

- Can be used for Track and Field, soccer, soccer training, football under 12; concerts large or small, not needed to be covered at this time but able to do so later; artificial ice, synthetic ice, plan for off season;
- Skating and speed skating; venue in winter;
- Local soccer, football leagues; universities; track and field centre of excellence; converts; other national, international sports events; possibly expand and incorporate into "Metro Centre II" or incorporate a convention centre/Hotel complex;
- Concerts! Whatever suits the needs of the citizens of HRM;
- Forget FIFA; that's a one-week event. You don't build a stadium for a one-week event. If your business plan is based on FIFA or any upcoming event, it is a lousy plan;
- Recreation programs in wellness, physical activity, intro level sports, arts and culture, drama, dance, music, the list is endless;
- Wellness center. Physiotherapy center, nutritional counselling, leisure counselling, chiropractors, acupuncturists, naturopathic doctors, sports medicine clinics, spas as well as other private enterprise;
- Football, track, soccer, concerts, special speakers.

### **Q3 - WILL A NEW STADIUM IMPACT YOUR QUALITY OF LIFE?**

- I think it would be wonderful to expose our youth to world class athletics this stadium would draw. Could have trickle effect on more kids being active;
- Money available - self with employment in special events and concerts; employment (temp) for many youth; potential mid jobs for community members; social;
- Great for Dartmouth's economy;
- Could help our athletes by being a training facility;
- A stadium has no benefit to me. What I want is bicycle roads;
- A larger venue may attract sports and entertainment events that I might not otherwise be able to enjoy;
- Enhanced - with greater variety of "outings"; greater feeling of being part of the rest of Canada from potential CFL team to additional Canadian site in coast to coast shows or tours;
- Yes a stadium would improve the quality of life in HRM (socially, economically) and have health benefits;
- Possible part time employment for me and family members. Family outings;
- Economic employment and taxes; social - great benefit for all of the Province; Health - encouraging younger children to participate and to be more active;
- Taxes might go up (but that's OK) may be a chance to see events/games we normally don't see (even in the fog!), may consider going to a concert! (would not go to Halifax);
- Social - expanded opportunities for community gathering, celebrations, extravaganza's or rallies. Opportunities to promote local talent and culture as well as international Fundraising opportunities like bust-a-move promote physical activity and greater awareness of health;
- More opportunities for children and youth to be involved in sport and recreation. Employment. Schools (HRSB) and French school board could promote an agreement for

reciprocity of use. Every year, every child could try a new sport or see a professional team play an exhibition;

- More opportunities for fitness, physical activity, training, gyms, etc.
- Promotes health lifestyle and community togetherness;
- No impact on me personally unless the facility cannot sustain itself operationally. I do not want to have to pay taxes (additional property) to pay for this facility. Taxes for Capital cost should be by all three levels of government (Federal, Provincial, HRM). I would attend events of interest to me.

#### **Q4 - WILL A NEW STADIUM IMPACT THE QUALITY OF LIFE OF THE REGION ?**

- Raise profile of HRM on National, International stage;
- Could help re-vitalize downtown if so located, by attracting residents and visitors, with resulting benefit to local business;
- Could provide a facility that encourages participation in sport: perhaps centre of excellence
- Yes - economic boost; pride in HRM city and its teams;
- Economically - by bringing in visitors to HRM to attend large events;
- Economic - same as #3 boost to whole province, encourages competition in the Maritimes; any sports facility that can attract major tenants will always aid in the development of our youth;
- The only ones who will truly benefit are the contractors who would build it, and the event producers;
- It will deeply affect the future of Halifax! It will give (hopefully) a much needed boost to Halifax's future and economy while promoting a healthy lifestyle for now and future generations which seems to be often overlooked for today's present needs;
- May attract people to the Region (encourage others to return), economic development;
- Enhanced community feel if Halifax has a "team"; better community spirit, particular downtown at time of use or game;
- The economic spinoff would be great for the Government and municipality and federal tax use;
- As one of the last provinces without a stadium as is imperative that the feds join us in this adventure; public access for limited use is necessary;
- Would be a much needed amenity if HRM acquires the bid for the building of combat and noncombat vessels. Families/professionals moving here will want/demand modern, flexible, multiuse sport and recreation venues and vice-versa HRM will be able to attract more residents and visitors with such a major piece of infrastructure;
- There are certainly social and health benefits too numerous to mention for the region as a whole as I won't detail same. Economic Benefits, employment benefits, construction and operational spin offs to other business in HRM where events held (too numerous to mention). Will impact taxation of citizens if not operationally and feasible.

#### **Q5 - HOW COULD A NEW STADIUM BE ACCESSIBLE TO THE PUBLIC?**

- Make it welcoming, open, vibrant and non-intimidating. Don't just promote the sports them as it will alienate the rest of the population. Feature events and activities that are local-based, accessible and affordable. Target families. Target new Canadians, target youth, target schools;
- Paying tenants; priority #1; built at newer; existing infrastructure;
- Accessibility = transit access; highway access (not Downtown); accessible for the disabled;
- Neutral zone for stadium (centralized); parking lot and stadium together;
- Anyone who wants to use the stadium (performers and spectators) should pay their way in, no get there for almost free at taxpayer's expense;
- Put in the right place! Easy access from the highway/no ads/metro transit; accessible to amateur sport teams and community baseball, soccer, lacrosse, football;
- Transit, parking, off event room use non-profit MTOs, weekly community meetings; health events/clubs;
- Allow for access by: highways, transit (potentially run special shuttles during games, events) via harbour, ferries, allow for biking in the future;
- Stadium should be located in an area what allows easy and quick access and express, large parking area for tail-gate parties;
- Location! Location! Location! Easy access to highways (not from downtown Halifax); changes in the way transit operates i.e. go out to areas such as Timberlea, Porteus Lake, etc. when events are held. People would probably pay more just to be able to attend the events. Parking should be available at park and rider (free) with metro transit buses at these sites; encourage carpooling, possible reduced event fee (1.00 per person?); needs to be easily accessible for the disabled.

#### **GENERAL COMMENTS**

- Not one penny of taxpayer's money should be invested in this. There are more important things to do. Start by putting criminals in jail and by stopping that murder frenzy. We don't need a new convention center either. We don't need multi-million white elephants. Lower taxes, please - we already pay too much, to a City Council who thinks money grows on trees;
- Stadium should be put on Dartmouth side either Shannon Park or Brightwood Golf site. Make it modular so it can be added to in the future;
- This project must be delivered as a good-for-everyone facility. Not only HRM, but the Province and the entire Maritimes. It can be done - but not at any cost!!!!
- Let's avoid some of the mistakes made in the Commonwealth b.u.;



## **OPEN HOUSE LOCATION: BEDFORD**

### **Q1 - HOW WOULD YOU DESCRIBE AN IDEAL STADIUM FACILITY?**

- Needs to be site to allow for ample parking, transit access; far enough away from residential access to prevent problems with noise complaints. Stadium should include capability to cover the field for winter field use. Section flexibility for sports, concerts, public gatherings;
- Accessible via multimode - bikes, walk, bus, drive, etc. Don't cheap out, quality, size appropriate, scalable, something to be proud of, multi-functional - something that appeals to non-sporting public innovative technology, architecturally beautiful, space conscious - less parking, more transit;
- An ideal stadium to me is one that is away from the downtown Halifax core, accessible by public transit, not far from highways, and access to the Bridges, with traffic flow considered, given the number of people expected to attend the function. The stadium must be accessible for wheelchair users too, it should be a multi-use facility - used by all ages for sporting activities, so though given to well-designed and good quality seating, hand rails, safety of movement by larger numbers, safe step heights, so don't go the cheapest route. But do we need this now?
- 25,000-30,000 seats; real seats not benches; I think you need 20-30 events a year; 50-60 would be perfect; events meaning sold out seats;
- Multi-use; 10,000 expandable to at least 20,000; easy access to major highways;
- Not a good idea at this time;
- The stadium needs to be located where it can be expanded, if needed; it needs to be accessible for all communities; public transit routes can be designed to accommodate events. It should not necessarily be downtown; Shannon Park would be a good location.

### **Q2 - HOW MIGHT YOU SEE THE FACILITY BEING USED BEYOND THE FIFA EVENT?**

- Beyond FIFA the stadium could be used for other sporting events, outdoor concerts (no need for a roof-move);
- Stadium needs to be able to be used by all citizens after FIFA needs to be cost effective. Corporate funds and let it pay for itself;
- Concerts - more than 1 or 2; CFL would be good not sure City will support IT; local sport can it be used for softball; will St. Mary's use it;
- CFL games; local sporting events; national events; international events; university football; concerts.
- Community sports; concerts; special sports events - football, MLS soccer exhibitions, Atlantic Bowl, Vanier Cup, outdoor hockey games, track meets, university sports, football, soccer (hockey); special events, religious revival, trade shows, monster truck, rodeos, BMX rallies
- All forms of sport but also important to appeal to Non-sporting audience; antique car shows, concert, general fitness, activities, ceremonies, exhibitions, area for operating remote control cars, planes, etc.

### **Q3 - WILL A NEW STADIUM IMPACT YOUR QUALITY OF LIFE?**

- Provides an opportunity for my grandchildren to compete at a higher level;
- Poorly if my taxes go up; look at having an arena tax. If it's built in the downtown core - hotels, restaurants, bars are the ones that benefit not me. If there's a CFL Team then there is City pride;
- It would be too costly as all other project has been i.e. Library. Therefore our taxes would be higher to maintain the stadium;
- The ability for citizen to congregate in large numbers for a common purpose can help to build civic pride; Greater national exposure;
- We should be ashamed of the stadium facilities that we presently have. Does Halifax need a decent facility? Of course!! It needs to be built in the proper location based on logic and common sense. Certainly not to ponder to parochial political thinking;
- Support for soccer makes us more attractive to immigrants. FIFA World Cup female event = great to support Female sport;
- Yes. More pride in my community. Entertainment opportunities. Large sporting events to inspire you. More fitness opportunity. \$\$ attract larger events.

### **Q4 – WILL A NEW STADIUM IMPACT THE QUALITY OF LIFE OF THE REGION ?**

- Wish I'd had the questions before to right some of my thoughts could be prodded to produce. More than a personal impact, this new stadium is surely to have a big impact on the HRM region. I am not sure our City can afford this. Who will it benefit? Who will be able to afford to attend the functions - will it really be affordable for the average family? Can't be a multi-use facility, a place of learning also?
- Absolutely. Large events in any of the Maritime Provinces benefit NS, PEI, NB. Atlantic Canada is at a significant Long term disadvantage without a stadium;
- Venue for youth sports and has a positive effect on health and wellness. Bring HRM closer to National average in terms of sports facilities for a City our size;
- No. Majority of HRM citizens would have no need for the stadium and therefore would only feel the impact of higher taxes.

### **Q5 - HOW COULD A NEW STADIUM BE ACCESSIBLE TO THE PUBLIC?**

- The stadium - accessible - accessible by public transport to people coming from outside city = good routes;
- Multi-functional. Accessible via multi-modes - bike, walk, bus, ferry, drive and park. Sport and non-sport use. Audience Protected from weather/comfortable;
- Needs to be built around public transit and good road and parking.

### 1.1.1 GENERAL COMMENTS

- I do not support the stadium project, and I feel HRM is not in a good financial position to fund such a project. The FIFA event seems like a worthwhile event to support, however, one event, no matter how major, does not justify a stadium: nor do I believe that a CFL franchise would be viable in this Region (and I am a sports fan). I believe a stadium project should not be pursued on the backs of tax payers. One major factor I believe is not addressed strongly enough on projects like this are the ongoing operational and overhead costs. In better times, financially, for HRM, this might be a worthwhile project, but not now;
- Support female sports e.g. FIFA; Support for soccer = more welcoming community for immigrant populations. This is not too big for NS. Don't underwhelm the situation. Don't sacrifice the stadium for other projects.