



Stadium Analysis – Phase 1 Analysis Business Plan and Consultation

Agenda

- Steering Committee Overview
 - Recommendation to proceed to:
Stadium Analysis - Phase 2 Site Selection, Design, Cost
- Consultant Presentation – Phase 1 Findings
- Next Steps – Phase 2 Analysis
(pending Council approval)
Site Selection, Preliminary Design, Costs



Halifax Stadium

Phase 1 Analysis



The Stadium Analysis Process

Phase 1

- Stadium Consultation and Business Planning

HRM Regional Council approval required to proceed to next phase

Phase 2

- Consultation, Site Selection & "Building" Program

HRM Regional Council approval required to proceed to next phase

Phase 3

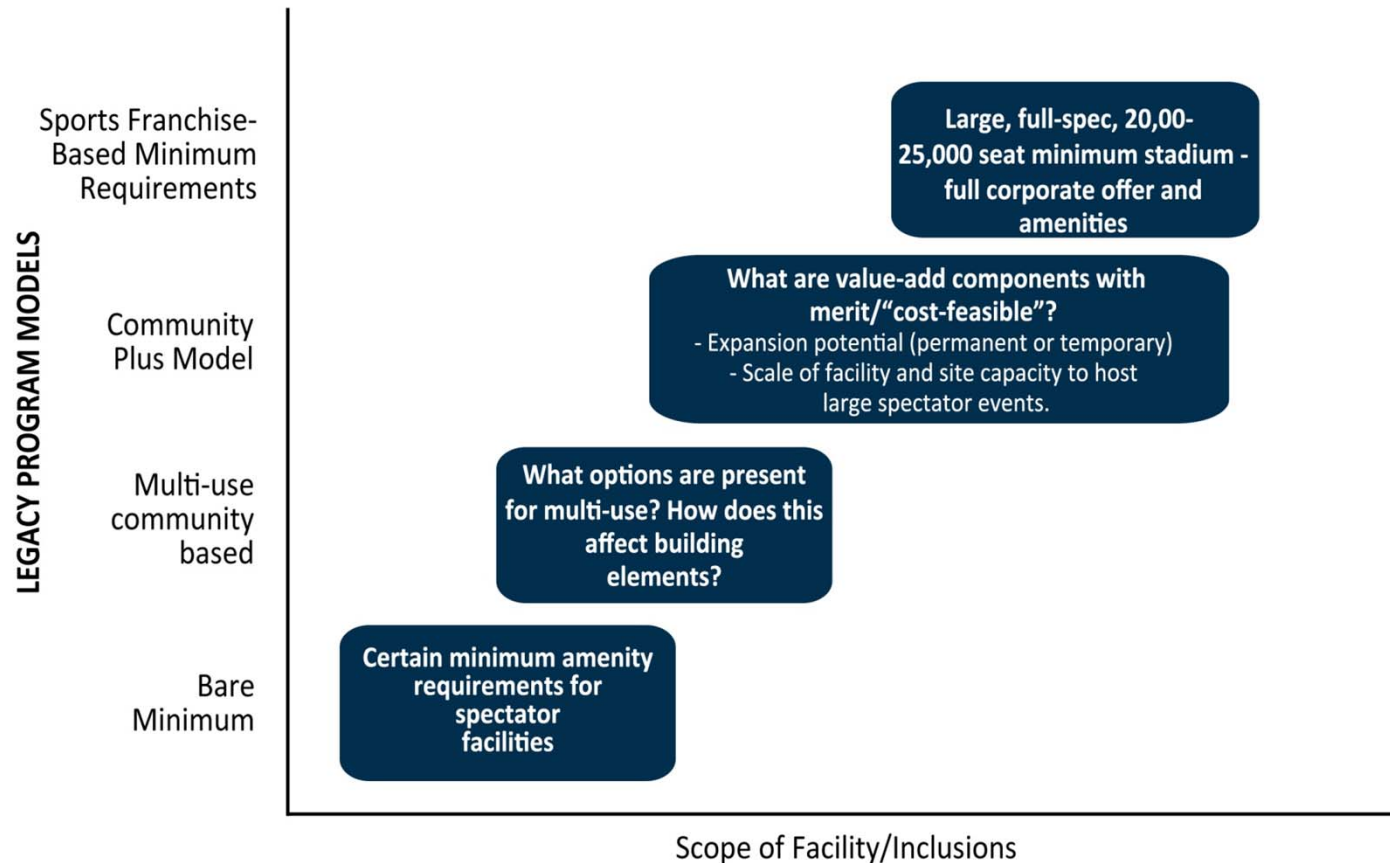
- Construction

Phase 1 includes:

- Facility design specifics
- Site location
- Details of prospective partnerships

The Stadium Analysis Framework

Analysis Framework: Testing the Alternate Legacy Opportunities



- Phase 1 addresses questions and merits associated with alternative stadium options

Phase 1 Research Program

Background Research and Review

- Previous work completed, statistics, trends, policies, etc.

Community Engagement and Consultation

1. Key Informant Interviews (17)
2. Key Informant Group Meetings (30 participants)
3. Survey of Provincial Sporting Organizations (7 groups participated)
4. Public Open House Meetings (93 participants)
5. Social Media Engagement (Facebook and Twitter)

Case Studies / Best Practice Research

- 10 detailed case studies of North American stadia
- 8 detailed review of current stadia development in Canada

Facility Seating Requirements

	Minimum Permanent Seats	Total Seating Requirement (Permanent and Expanded)
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	

Stadium Needs and Opportunities

Field and Facility-Related Needs



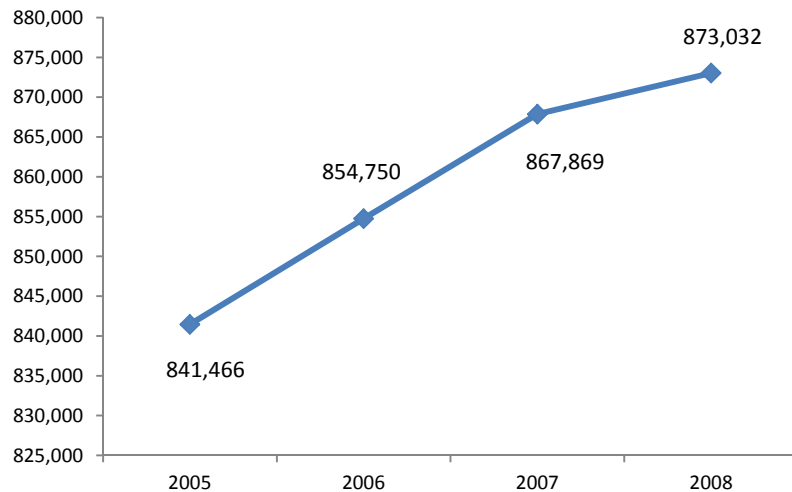
Stadium/Spectator Event-Related Opportunities



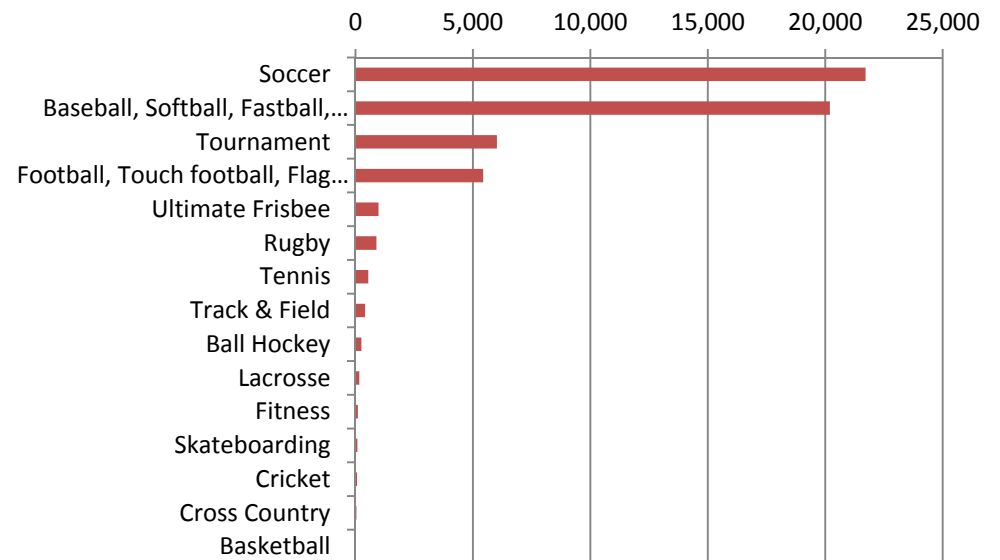
Stadium Need : Field and Facility Related Need

1. Need determined by HRM Community Facility Master Plan (2008) to build additional artificial turf field and indoor turf facilities (CFMP pg. 24)
2. Growth in soccer nationally, provincially and locally
3. Other field sports are growing in the region
4. Population of HRM continues to outpace existing “high” growth projections

Number of Registered Soccer Players In Canada



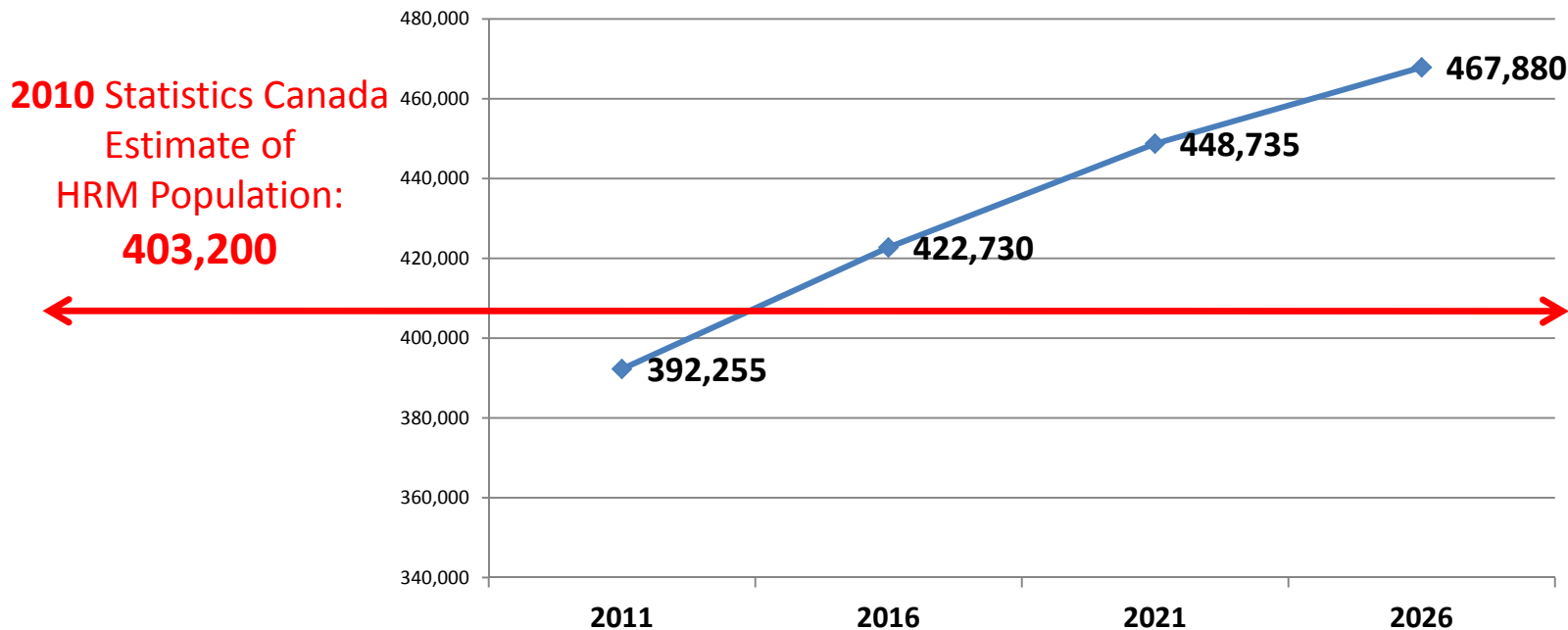
HRM Facility Usage by Activity (Hours)



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**HRM Population Projections (2011-2026)
High Growth Scenario**



HRM Field Programming Impact

Stadium Field Programming Impact		
<i>Total HRM Sport Field 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%
Estimated Stadium Annual Field Usage	1,500	5%

- Full stadium programming represents only 5% of total usage booked
- Over time, this proportion can be expected to decline

The Context – Range of Events Occurring

(not specific to HRM)

Estimated Available Events	Annual Events	Special Events (over 2015-2025)
Soccer	38	16
Football	13	1
Rugby	5	
Lacrosse		2
Field Hockey	4	
Multi-Sport and Other Events	4	11
Total Available Events	64	30

Estimated Annual Spectators and Participants

- 60,000 – 90,000 spectators annually
- 4,000 – 6,000 participants annually

- Potential for hosting significant number of Provincial and Atlantic Regional Events
- Primarily non-ticketed, participant-based events

Possible Major Events and Indicative Attendance

2015-2025

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 Opportunities – Non-Sporting Event Opportunities

Type of Events with Capacity to Draw 20,000+ Spectators:

**Large-scale
outdoor summer
concerts**

**Outdoor
trade shows**

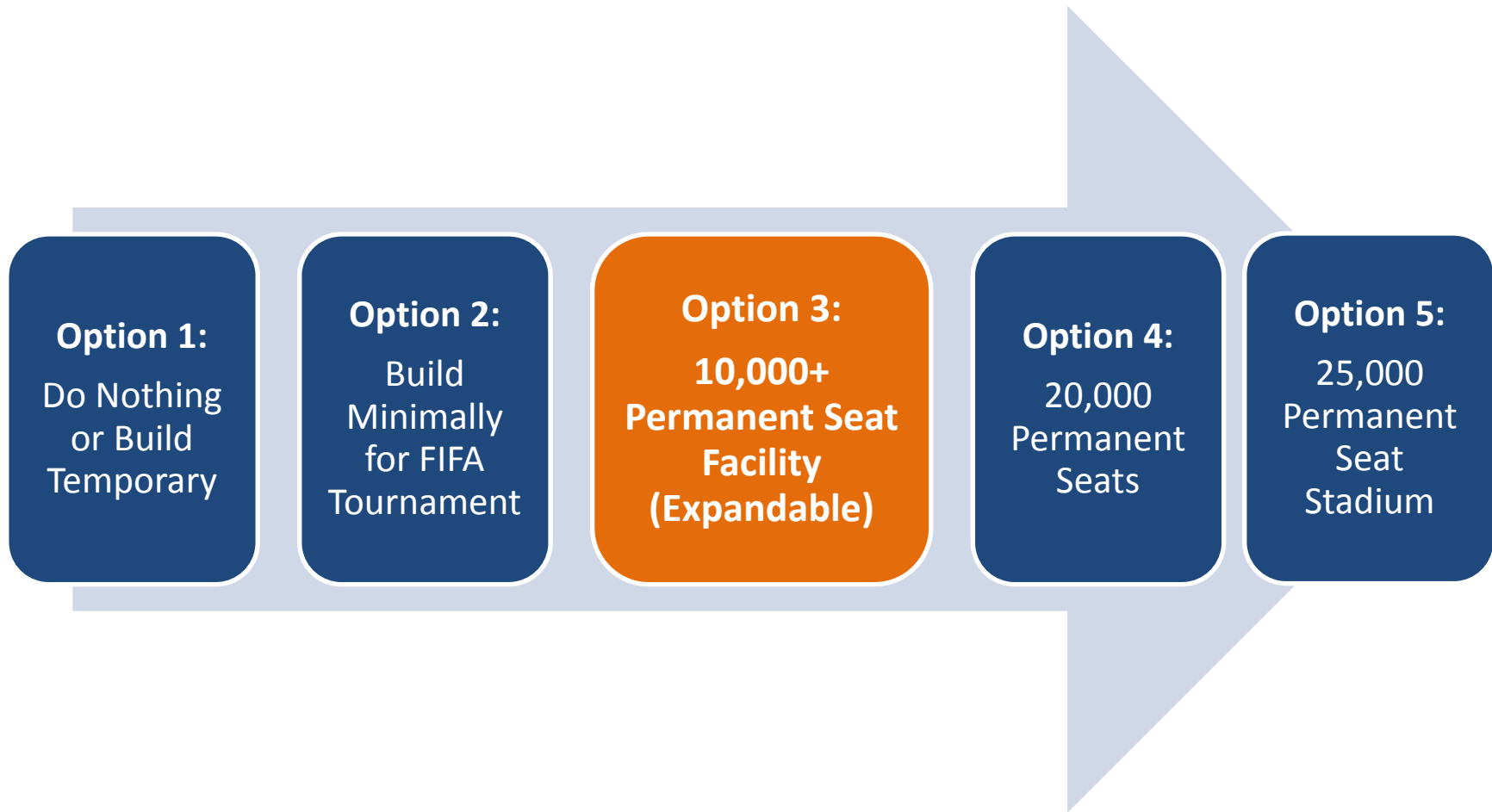
**Significant cultural
and community
events**

Infrastructure Requirements to Host Major Non-Sporting Events

1. Basic infrastructure to support performance systems and equipment
2. Augmentation of the public facilities
3. Augmentation of support facilities
4. Augmentation for vehicular access, parking and for backstage set-up
5. In-field would require capacity to support heavy loads

Large scale live performances drawing 20,000 or more spectators in HRM are feasible only once or twice per season.

Range of Facility Options and Preferred Option



Recommended Concept (Option 3) Scenarios

Scenario 1 Conservative

Scenario 2 Moderate

Similarities:

- Type and scale of facility
- Estimated number of event days
- Largely similar operating cost assumptions (conservative)
 - Attendance estimates

Differences:

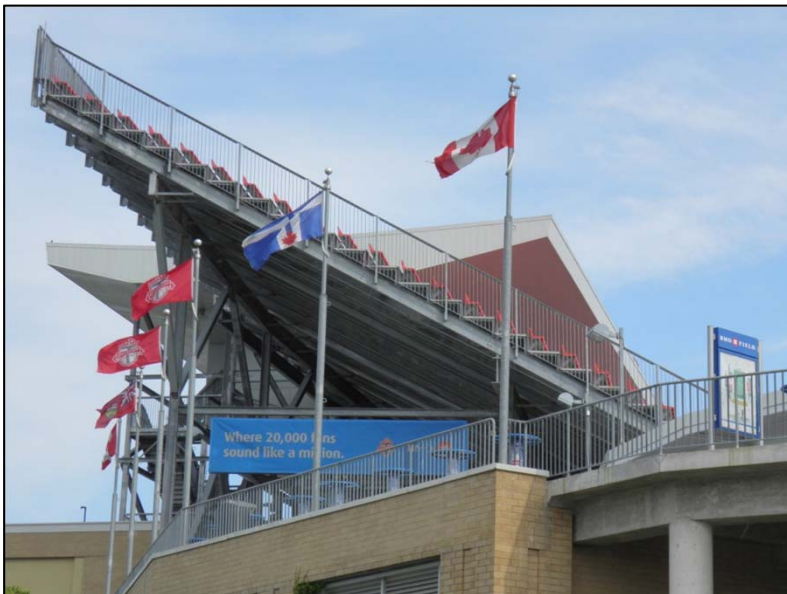
Conservative facility revenue estimates based on Recognition of risk

Market-based estimate of revenues while maintaining recognition of risk

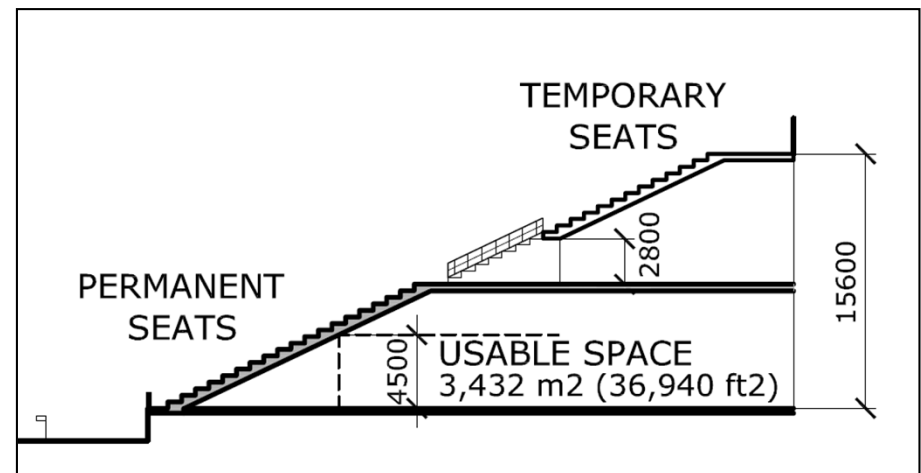
Recommended Concept - Indicative Financial Performance

	Financial Performance	Potential Economic Impact	Community Return on Investment
Scenario 1 (conservative)	Annual Deficit to Facility of \$190,000 (excluding capital reserve) \$475,000 (incl. capital reserve)	\$3.5-5.3m annually to HRM from event spectators and participants	<p><i>Function of: the range of uses developed on site, location and accessibility to a majority of the HRM resident base, etc.</i></p> <ul style="list-style-type: none"> • Enrich community participation in sport • Enable improved services such as coaching, elite training and potentially cultural programming. • quality of life contribution
Scenario 2 (moderate)	Annual breakeven performance (excluding capital reserve), Annual Deficit to Facility of \$295,000 (incl. capital reserve)	\$3.5-5.3m annually to HRM from event spectators and participants	

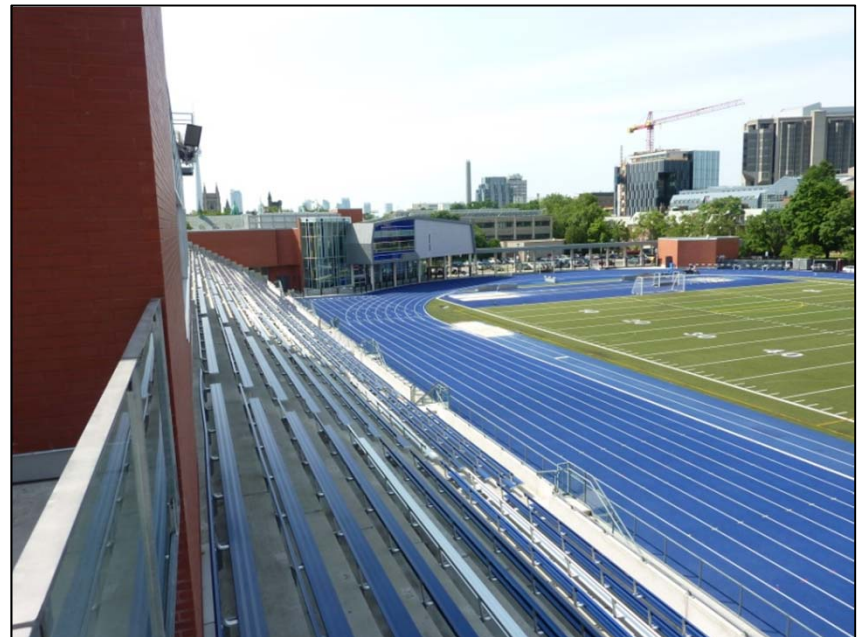
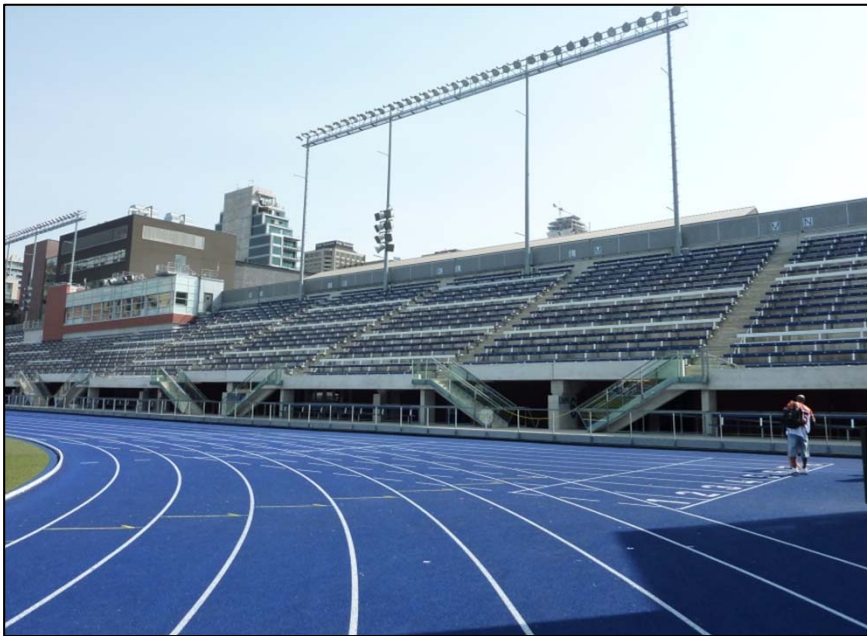
Importance of an Expandable Grandstand



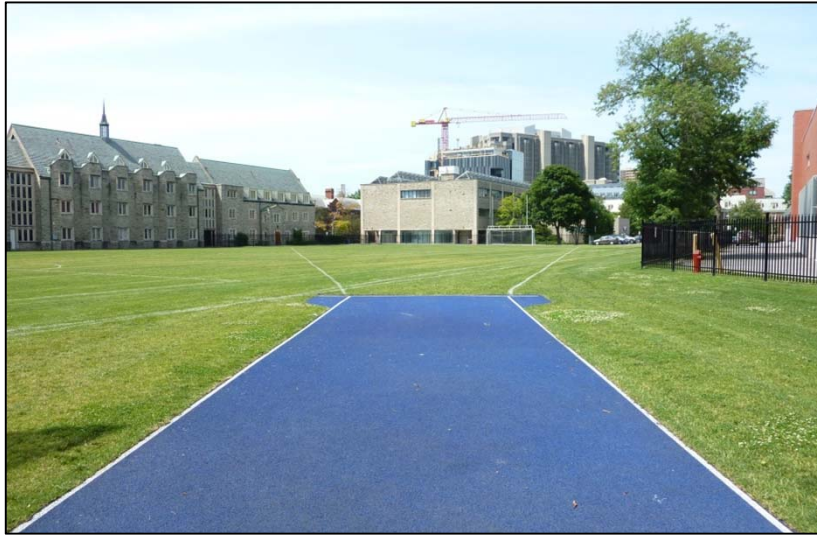
- Major grandstands essential
- Principal and secondary grandstand



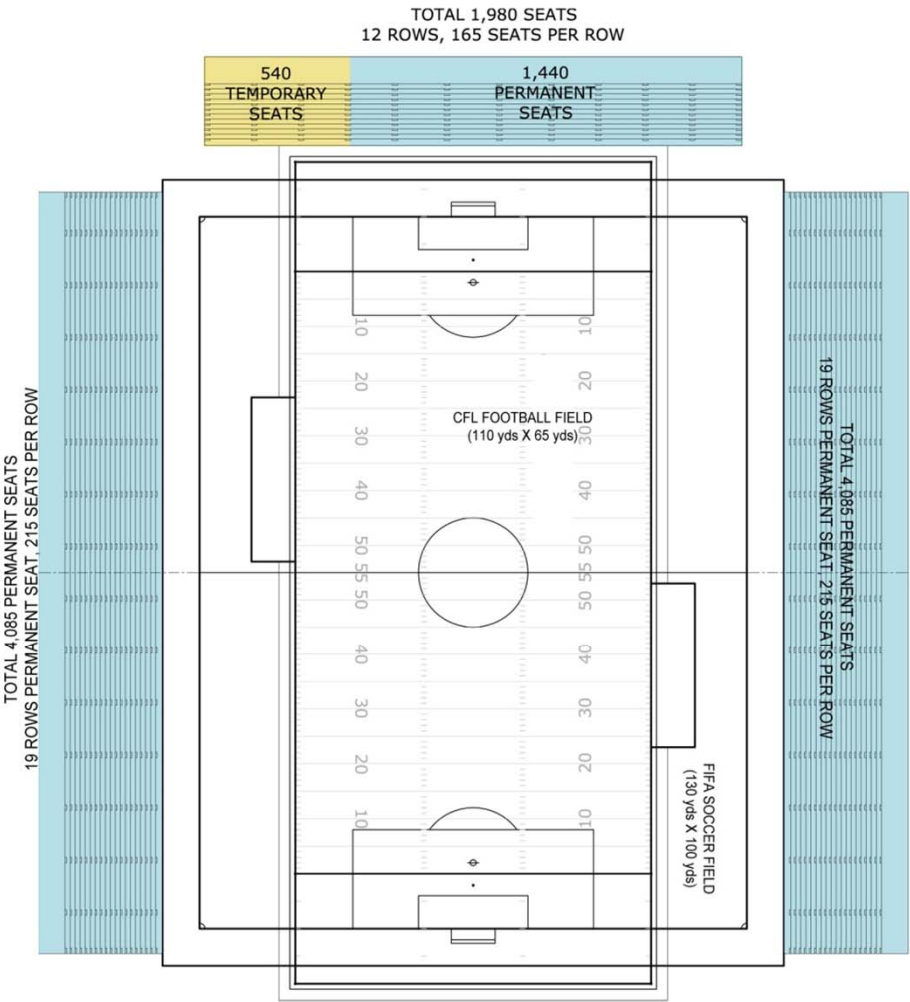
No Internal Track Recommended



Examples of Multi-Use



The Concept – Multi-Use Opportunities



Ancillary/Synergistic Uses

- Objectives:**
1. Maximize quality of community recreational infrastructure
 2. Create economic impacts
 3. Improve sustainability of stadium operations

- ✓✓✓ Additional field(s)
- ✓✓ Potential for track
- ✓✓ Other major recreation facilities including other non-profit based sport facilities
- ✓✓ Tenanted multi-use within grandstand building:
 - Offices (sports related/wellness)
 - Private fitness space
 - Retail (location dependent)

Possible Private Sector Opportunities:

- Accommodations
- Commercial

TIMING (SCHEMATIC)

- Short-term
- Variable
- Medium-term
- Immediate

Location Dependent & Longer-term

Ensuring Best Location

The most advantageous location will be one that meets critical, future oriented needs, including:

1. Regional accessibility;
2. Maximizes the benefits of existing infrastructure in the Regional Centre;
3. Development as part of an existing campus of recreation and other complimentary uses, or in close proximity to other such uses;
4. Enables expansion on-site to accommodate the potential evolution of the Stadium; and
5. Creates opportunities for private development.

Final Report Recommendations

1. Proceed to Phase 2 detailed analysis of cost, site and design
2. Proceed with a market based opportunity for a 10,000 + permanent seat facility
3. Invest in primary and secondary grandstands, building and site services, site capacity to enable expansion as viable. Design and capacity of modular expansion of the facility is critical.
4. The model is the community plus model – dual mandates of community use of the facility as well as significant event potential;
5. Based on Phase 1, do not pursue a permanent seat facility of 20,000 to 30,000 seats

Final Report Recommendations (continued)

6. Undertake a value for money (VFM) exercise relative to market potential, of additional permanent seats over and above 10,000.
7. Based on Phase 2 assessment of capital cost, site location and design opportunities, undertake necessary VFM analysis as part of continued business planning.
8. Recommended Delivery mechanism: Design-Build-Operate
9. Operational should reflect need to effectively integrate with broader Event Attraction mandate of City and Province.
10. Financial Performance of the Facility is subject to risk – to reflect risk, adopt Scenario 1 indicative financial results as the working assumption subject to further assessment as part of Phase 2

Final Report Recommendations (continued)

11. Enable maximum economic and community social impact from this facility by enabling its mandate to evolve.
12. Adopt the following principles in determining specific form, function and location of facility:
 - Year round operation
 - Exclude internal running track
 - Maximize the potential for tournaments and sport tourism by locating in proximity to existing or future complimentary facilities (e.g. field, other built facilities, other hosting infrastructure)
 - Animate the site as a campus
 - Develop to a high level of quality
 - Ensure regional accessibility
 - Maximise the benefit of existing infrastructure

Thank You



Next Steps

- Phase 2 Analysis (September – December)
 - Request for Proposals
 - Site identification and evaluation
 - Facility preliminary design
 - Class C capital cost
 - Public Engagement Program
- Capital Affordability & Funding Options to Council
 - (end of September)

Request for Proposal

- Multi-disciplinary team
- Post RFP and Award in September
- Building on results from Phase 1 Analysis
- Reporting through CD Project Manager to Steering Committee
- Final report to Regional Council December

Site Identification and Evaluation

- Identification and analysis of 20+/- site
 - Evaluation / scoring based on Phase 1 criteria
 - Principles to Guide Development p 64
 - Range of facility options p 68
 - Locational Criteria Appendix E
- Detailed analysis and public discussion on top scoring sites (private, government)

Staff Recommendations

- Approve in principle recommended directions in Final Report (Option 3)
- Direct Staff to proceed to Phase 2 Stadium Analysis – Site Selection and Preliminary Design
- Approve Phase 2 funding from Strategic Growth Reserve Q126
- Return to Regional Council end of September for capital affordability and financing options discussion