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FINAL REPORT

NEEDS ANALYSIS FOR MULTI-PURPOSE SPORTS & ENTERTAINMENT FACILITIES CITY OF OTTAWA

CRG File # 08-096

Prepared For



December 2008

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Executive Summary

Background

The Corporate Research Group Ltd (CRG) was commissioned by the City of Ottawa to undertake a multi-purpose sports and entertainment facility needs assessment for the City of Ottawa.

The assessment is being undertaken to help the City determine their need for sports and entertainment facilities and by extension whether there is a requirement to seek new facilities and/or to expand or renovate existing facilities in the City, in order to solidify and strengthen Ottawa's position in attracting major sporting events, consumer and trade shows, as well as meeting the needs of the community.

The approach and methodology employed by the Consulting Team (CRG) consisted of a combination of research and analysis including consultation with industry stakeholders. Comparable major cities in Canada and in the United were also canvassed to identify and assess new facilities that have been developed or are being proposed.

As part of the mandate, the CRG Team identified and evaluated possible sites in Ottawa for the location of a multi-purpose sports and entertainment facility.

The highlights of our research and the associated findings and conclusions are provided below, additional detail is presented in the accompanying sections and appendices.

Facilities Overview

In considering the need for major sports and entertainment facilities in Ottawa, it was important as a first step to understand and distinguish between various types of facilities and the events they host. Research and consultation identified the following major categories of sports and entertainment facilities and associated events:

- Sports Facilities – these comprise facilities designed primarily for sports uses such as hockey arenas, soccer and football stadiums, swimming pools, etc. In Ottawa (and elsewhere) numerous of these facilities combine uses and functions although in some cases facilities are designed for a single sport or even for a specific team;
- Entertainment Facilities – these include public and private concert halls, theatres, etc.;
- Exhibition Facilities – these include facilities used to host trade and consumer shows and generally serve mostly local audiences (home shows, boat shows, etc);
- Convention Centres – These facilities typically combine exhibition areas with meeting areas. They also generally have direct access/linkages to hotels. These facilities differ from exhibition facilities by their inclusion of these other elements. They are also focussed mostly on attracting non-local users for meetings and conventions;

Despite the differences in facilities and uses, there is no doubt many are planned and used for multiple purposes, and this serves to improve both their usage and their economic viability. Hockey arenas for example are regularly used to host numerous other revenue generating events (i.e., concerts), and Lansdowne Park, the City's largest facility, is truly multi-use, hosting

major sporting events at both community and professional levels (hockey, soccer and previously football), as well as entertainment and trade and consumer shows.

Notwithstanding, there is considered to be a limit to the uses and adaptability of facilities, and clearly no single facility that can well serve all requirements. Arenas for example (even NHL sized) have limited floor space and so do not function well as Exhibition Facilities. Similarly, Exhibition Facilities are not typically designed with seating in mind and thus have limited adaptability for entertainment uses.

Ottawa Facilities

Ottawa, as the Nation's Capital, is widely recognized as having an exceptional quality of life with a cultural diversity that is not found in most cities of similar size. This extends to sports, entertainment and cultural facilities, and the City is known for its National Arts Centre and numerous world class museums. In terms of Sports and Entertainment Facilities, the City of Ottawa has a significant complement of facilities ranging from neighbourhood arenas and community centres, up to those which host professional sport teams and international entertainment events. Within these extremes there is a broad range of public and private sports and entertainment facilities.

Discussions with stakeholders and a review of facilities in Ottawa and elsewhere yielded the following observations regarding Ottawa facilities:

Sports Facilities

- Research and comparison to other cities clearly shows Ottawa has an impressive mix of public and private sports facilities. This includes community level facilities up to those which host professional teams. Most impressive is the number and quality of arenas;
- Usage of Ottawa sports facilities is generally high, as most community level sports facilities are fully subscribed at least during peak playing periods;
- Discussions with stakeholders and a review of facilities in other locations/cities did not identify major sports facility gaps in Ottawa. Notwithstanding, the City is growing and this is putting pressure on existing facilities and yielding demand for new/expanded facilities. Indeed, numerous stakeholders believe the City has reached the point where it can support and requires a new major multi-use facility, partly to replace older outdated facilities;
- Numerous stakeholders specifically identified a need for additional soccer facilities in Ottawa, as demand is growing and facilities are limited. A facility of this sort would clearly be needed in the event professional soccer was introduced in Ottawa;
- A key issue for Sports Facilities in Ottawa is the age and condition of existing facilities and the need to modernize and/or expand facilities. While individual facilities were not specifically reviewed as part of this project, condition and functionality varies and some, notably Lansdowne Park, are older and in poor condition and lag considerably in condition and functionality compared to modern facilities.

Entertainment Facilities

- Research and comparison to other cities shows that Ottawa has a good mix of public and private entertainment facilities including numerous purpose built facilities; and

- Area entertainment facilities are seen as being capable of accommodating various types and sizes of events and stakeholders report no major issues or events by-passing Ottawa because of a lack of appropriate facilities;

Exhibition Facilities and Convention Centres

- There are numerous public and private Exhibition Facilities in Ottawa, the largest being the City owned Lansdowne Park. This facility has a multiple building configuration and well documented age and functional challenges, nonetheless it is still the largest and most widely used facility for major consumer and trade shows held in the City;
- There is currently strong demand for exhibition space in Ottawa and at Lansdowne specifically. This largely reflects the lack of alternatives in the marketplace, as no other facility offers the total exhibition area available at Lansdowne (almost 100,000 square feet);
- Even with Lansdowne Park, Ottawa is clearly on a lower tier compared to other major Canadian cities with respect to the availability and quality of Exhibition space. In fact, much smaller cities such as Regina and Saskatoon offer more space than Ottawa;
- According to stakeholders, a modern exhibition facility in the range of 150,000 to 200,000 is needed in the Ottawa market to host consumer and trade shows; and
- The redevelopment of the Ottawa Congress Centre is not seen as fulfilling the need for improved Exhibition Space, as the two mostly serve different markets – an Exhibition facility largely caters to local shows, whereas a Convention Centre is designed to attract mostly non-local events and participants. Positively, an expanded and modernized Congress Centre facility will enable Ottawa to more effectively compete for Conferences and Conventions.

Facilities Scan

Comparable major cities in Canada and in the United were canvassed to identify and assess new major sports and entertainment facilities that have been developed or are being proposed, and under what conditions, terms of the deals, etc. This research yielded the following key findings:

- A clear trend towards grouping professional and higher level sports with both entertainment and community uses. This is an effort to create efficiencies and synergies and to respond to a mix of professional and community needs;
- In terms of drivers, new facilities tend to be spawned by a combination of major events (e.g., Olympics and the associated funding), municipal needs and/or private sector interest such as associated with bringing a new professional sports franchise to a city;
- From a locational standpoint, the scan identified most new facilities are being developed in central urban neighbourhoods, and as catalysts for renewal and broader redevelopment. Developing one or a group of facilities outside the urban core in generally undeveloped areas while commonplace in the past is no longer prevalent;
- Funding and operating models for new facilities vary. In Canada, recently developed facilities (e.g., BMO Field in Toronto and Saputo Field in Montreal) typically include a combination of public and private funding. Municipal funding is generally part of the mix, often in the form of a land and/or infrastructure contribution;

- While the motivating factors and type of facility vary, city's that have moved forward with the construction of large sport and entertainment facilities have used the opportunity as a catalyst to enhance an immediate neighbourhood and the larger community;
- New facilities have invariably formed part of larger and more comprehensive developments that either are breathing new life into degenerated city centers through comprehensive development plans and/or creating vibrant community gathering places that respond to both the needs of professional entertainment and sport and to those of the surrounding community.

Facility Requirements, Summary and Recommendations

Research and analysis conducted yielded the following key findings and conclusions. Facility recommendations are also provided:

Requirements Summary

- While Ottawa boasts a strong compliment of sports and entertainment facilities, numerous of these are older, outdated and will require upgrading and/or replacement in the near term;
- Most current major facilities in Ottawa are not considered presently suitable as venues for professional events/teams, the notable exception being the City's baseball stadium;
- Ottawa will therefore require new facilities in the future, both to replace aging ones, and to address new requirements;
- The largest and newest major sports facility in the City (Scotiabank Place) was built according to an older method of location – in an isolated location, and at least initially was not easily accessible;
- If a new major sports facility is built in Ottawa it will be driven by a major need, either facility replacement (e.g., Lansdowne) and/or the need associated with a specific use such as professional teams locating/relocating to Ottawa (e.g., professional soccer and/or football).
- The specific type, size and elements included in any new facility will therefore be dictated by the mix of uses/users and the players involved;
- While our review of sports and entertainment facilities in other locations suggests there are challenges in combining uses into a single facility, this approach is used effectively and is considered the most realistic approach for Ottawa, given market size. That is to say, Ottawa cannot realistically support more than one new major facility in the near or even medium terms;
- Any new major facility developed in Ottawa should therefore be designed with multiple uses in mind and designed to address needs from the community level up to professional sports and entertainment. In this way the new facility can function as a location/node where numerous needs are served;
- In terms of location, any new larger multi-use sport facility developed in Ottawa should be located either in the urban centre of the City, as part of an overall development plan for an area that may include commercial, residential and/or retail redevelopment, or alternatively in a group setting to achieve a sport-entertainment district which provides benefits through common infrastructure, parking, shared facilities for larger events,

increased exposure for all venues to each others' user groups. In either case, accessibility is key, notably access to transit, parking, etc.;

- The size of the facility and associated land area will be dictated by the uses/users as well as location, nonetheless market norms suggest if a new major facility is developed it should provide:
 - Seating capacity in the range of 15,000–20,000 spectators, with expansion capacity depending upon the event/sport. This suggests a site area requirement of at least 25-30+ acres;
 - Associated facilities and amenities;
 - Parking requirement of about 1 space per 3-4 seats, although this will depend upon the uses, location, availability and proximity to transit, etc;
- A review of newer Canadian facilities suggests at least some level of public participation/funding will likely be needed if a new major multi-use facility is to be developed in Ottawa. Municipal funding is generally part of this mix often in the form of a land and/or infrastructure contribution;
- Partnerships with educational, amateur sport and other institutions should also be explored, both from a programming/need standpoint and also in terms of funding;
- The specific funding, ownership and operating model will in the end be driven by the uses/users; and
- Additionally or as part of a larger multi-use sports facility, consideration should be given to developing or promoting the development of new exhibition space in Ottawa. The expansion of the Congress Centre is not seen as fulfilling this need and the City is well behind others in the provision and availability of exhibition space.

Facility Recommendations

- 1) Ideal size, seating capacity and location of the facility:
 - If a major new sports facility is built in Ottawa it will likely be driven by a major need, either facility replacement and/or the need associated with a specific use such as professional teams locating/relocating to Ottawa (e.g., professional soccer and/or football);
 - The specific type, size and elements included in any new facility will therefore be dictated by the mix of uses/users. Nonetheless, market norms suggest if a new major facility is developed it should provide seating capacity in the range of 15,000–20,000 spectators, with expansion capacity depending upon the event/sport;
 - In terms of location, any new larger multi-use sport facility developed in Ottawa should be located either in the urban centre of the City, as part of an overall development/redevelopment plan for an area that may include commercial, residential and/or retail development, or alternatively in a group setting, such as in proximity to Scotiabank Place to achieve a sport-entertainment district/node which provides benefits through common infrastructure, parking, shared facilities for larger events, increased exposure for all venues to each others' user groups. In either case, accessibility is key, notably access to transit, parking, and complimentary attractions;

- 2) Open air or enclosed;
 - Open-air facility is recommended, although this could be impacted by the proposed use(s) – arenas and aquatic facilities obviously need to be within enclosed structures;
 - The ability to introduce a dome during winter months is also recommended and considered beneficial. This is current practice at numerous Ottawa facilities;
- 3) Types of spaces needed to ensure it is multi functional and adaptive;
 - Any new major facility should be designed to address needs from the community level up to professional sports and entertainment. In this way it can function as a location/node where numerous needs are served;
 - The mix and types of uses will be driven by the partnerships involved in the development. The amount and type of community space will be driven in part by the needs and contributions from various sectors;
- 4) Number or ratio of parking and the form they should take (e.g. surface, structured);
 - Market norms suggest parking requirements of about 1 space per 3-4 seats, although this depends upon the use(s), location, availability and access to transit, etc.;
 - Parking need not be dedicated solely for the new stadium, nor does it need to be located within the stadium complex, but rather must be available in the vicinity. A new stadium could therefore utilize parking that already exists within other nearby developments such as within downtown office buildings and/or as part of other existing sports and entertainment facilities;
- 5) Elevated or built partially in the ground;
 - The type of structure will be dictated by the mix of uses/users, its location, site size, configuration, access, soil conditions, etc;
 - Numerous facilities are built at least partially into the ground. This is done for a variety of reasons:
 - to conserve space;
 - to fit within an urban environment (i.e., zoning regulations and height limitations);
 - to achieve potential construction cost savings; and
 - for reasons of energy efficiency;
- 6) Ownership, management and programming options:
 - Ownership and operating models for Canadian facilities vary with some operated by the private sector, others by municipalities and others still by public-private ventures. The BMO Field in Toronto for example is City owned yet managed by a third party. The City and the third party manager share revenues and operating losses;
 - The extent of municipal ownership generally impacts the extent of community programming and time available;

- 7) Ancillary/compatible land uses:
- There is a clear trend towards grouping professional and higher level sports facilities with entertainment and/or community uses. This is an effort to create efficiencies and synergies and to recognize and respond to both professional and community needs;
 - New development taking place in areas surrounding major sports facilities often include a mix of retail/entertainment uses as well as hotels, consumer, convention and trade show facilities, residential developments, etc;
- 8) Environmental features and building technology solutions;
- As in most forms of new construction, Green building technologies, designs and features are being used extensively in the development of new sports and entertainment facilities. Key in this regard are energy related initiatives, given the large size and often open air designs associated with new sports stadiums. This includes developing facilities partly into the ground, solar orientations, etc;
- 9) Business plan concepts, sponsorship and advertisement revenue, gate fee's, parking and ancillary revenues, the need for provincial and federal funding, etc;
- A review of newer Canadian facilities shows a variety of models with respect to the sharing of development costs, revenues, sponsor involvement, etc;
 - Most new facilities involve at least some level of public participation/funding. The Mainland Common Centre in Halifax for example was funded 33% by the Regional Municipality, with the Federal and Provincial governments funding most of the balance. Other facilities, like the City of Winnipeg MTS Centre have been funded mostly by private investors, although the three levels of government did contribute to the capital funding.
 - Municipal funding is typically part of the mix, often in the form of a land and/or infrastructure contribution; The City of Winnipeg's share of the MTS Centre funding for example was 10% of the capital costs (\$14.5M);
 - Sponsorships, naming rights and the sale/lease of luxury boxes, etc are all important elements of facility revenues. It is notable that these revenue opportunities are more challenging in Ottawa than in other similar sized centres given the relatively small size of the corporate community, and similarly by the large presence of the Federal Government who do not typically engage in sponsoring or participating in sports and entertainment facilities in the same way as private corporations.
- 10) Role and necessity of amateur sports inclusion to secure government funding;
- Most new facilities tend to be spawned by a major event, an Olympic Games for example or similar, and the associated federal funding. Municipal needs and/or private sector interest such as associated with bringing a new professional sports franchise to a city is also often a key driver;
 - The involvement of amateur sport and other groups (educational institutions) is clearly beneficial and often part of the mix, although not commonly the main driver for the development or for securing funding;

11) Approval and construction time frames:

- Time lines for development vary. What is clear from the experience of other facilities is that up-front planning and the time needed to secure partners and funding generally exceeds actual construction time lines. In the case of BMO Field, actual construction took approximately two years from the date of City Council approval. Negotiations to secure funding and to identify partners took considerably longer.

Site Identifications and Rankings

As a final stage of the mandate, the CRG Team identified and evaluated possible sites in Ottawa for the location of a multi-purpose sports and entertainment facility.

Based on identified/agreed-upon site selection criteria, the CRG Team identified a total of 23 possible sites within the City of Ottawa that could be suitable as a location for a major sports and entertainment facility. This included sites within all areas of the City (suburbs west, south and east), as well as within and near the urban core.

Each identified site was scored/rated in terms of whether or to what extent its meets identified criteria and requirements. The highest ranking/score was achieved by two sites, 77.50 points out of a possible 95.00 points. These sites are:

- A City owned site along Bayview Road, including the Tom Brown Arena; and
- A property located at Carleton University.

Comparatively, the City owned Lansdowne Park site scored 72.00 points (out of a possible 95.00), ranking it 6th out of the 23 possible sites, and similarly the City owned site in Kanata which is proposed for the development of a multi-purpose soccer stadium, scored 70.75 points, ranking it 7th out of the 23 possible sites.

1.0 Background and Mandate

1.1 Purpose and Mandate

The Corporate Research Group Ltd (CRG) was commissioned by the City of Ottawa to undertake a multi-purpose sports and entertainment facility needs assessment for the City of Ottawa.

The assessment is being undertaken to help the City determine their need for sports and entertainment facilities and by extension their requirement to seek new facilities and/or expand or renovate existing facilities in the City, in order to solidify and strengthen Ottawa's position in attracting major sporting events, conventions and trade shows, as well as meeting the needs of the community.

1.2 Background

In order to continue successfully bidding for major national and international events, it is considered essential that the City of Ottawa have competitive multi-purpose sports and entertainment facilities. These facilities will allow Ottawa to bid for and host a variety of local, provincial, national, and international events.

Multi-purpose sports and entertainment facilities cater to the needs of both local citizens and visitors in the form of conventions, trade and consumer shows, concerts, and community and elite sporting events. These events provide a quality of life for local citizens and also attract significant visitors to the city, representing a substantial positive inflow of spending to the community, which in turn supports jobs, businesses, and generates tax revenues for the City and Province.

With the planned reconstruction of Lansdowne Park, there is now an opportunity to take a longer term view of the City's existing portfolio of multi-purpose sports and entertainment facilities and the activities carried out within them to determine needs for expansion or renovation, and/or the construction of new facilities.

1.3 Approach

The approach and methodology employed by the Consulting Team (CRG) to conduct the Needs Assessment comprised the following elements:

1) Needs Assessment

- Inventory major sports and entertainment facilities in Ottawa (and area) and provide an overview of uses;
- Provide a history of major events held in Ottawa;
- Describe the organizations and community groups that utilize major citywide facilities for local/regional recreational needs and local/regional trade show/convention and social event needs;
- Profile Ottawa's demographics and growth projections and compare Ottawa's profile to other Canadian cities to assess whether there are major differences in

the demographic profiles between cities that might also explain any differences in facilities;

- Canvas key stakeholders within sport, entertainment and exhibition organizations to:
 - Identify local needs and expectations with respect to facility requirements;
 - Identify major sporting, show, cultural and entertainment events that are being held in Ottawa as well as possible events that could be held in Ottawa if new/expanded/renovated facilities existed;

2) Multi-Purpose Sports and Entertainment Facilities Scan

- Examine comparable major cities in Canada and in the United States to determine if new facilities have been developed and/or if any recent studies have been conducted to determine needs for sports and entertainment facilities
- Prepare a scan of multi-purpose sports and entertainment facilities in other comparable urban centres, to determine the competitive environment for attracting major events.

1.4 Facility Overviews

1.4.1 Definitions

In considering the need for sports and entertainment facilities in Ottawa, it is important as a first step to understand and distinguish between various types of facilities and the events they host. Research and consultation conducted identified the following major categories of sports and entertainment facilities and associated events:

- Sports Facilities – these comprise facilities designed primarily for sports uses such as hockey arenas, soccer and football stadiums, swimming pools, etc. In Ottawa and elsewhere numerous of these facilities combine uses and functions (The Nepean Sportsplex for example includes arenas, swimming pools, curling rinks, gyms, etc. along with meeting rooms, offices and amenity spaces). Other sports facilities are designed for a single sport (e.g., BMO Soccer Stadium in Toronto) and some are purpose built for a specific team (e.g., Petco Baseball Field, San Diego, California);
- Entertainment Facilities – these include concert halls, theatres, etc. (e.g., CentrepoinTE Theatre);
- Exhibition Facilities – these include facilities used for trade and consumer shows. They are characterized by large open floor areas for presentation purposes and are used to host shows which cater both to the public (Home Shows, Car Shows, etc.), and to industry (Trade Shows). These facilities largely cater to locals;
- Convention Centres – These facilities are similar to and can compete with Exhibition Facilities, the main difference being they typically combine exhibition areas with meeting areas. They also generally have direct access/linkages to hotels. The intent of these facilities is to attract out of town users for meetings and conventions. Metro Toronto Convention Centre and the Ottawa Congress Centre are examples of these types of facilities.

1.4.2 Uses

Despite the differences in facilities and uses, there is no doubt many are planned/used for multiple purposes, and this serves to improve usage and economic viability. Hockey arenas for example are regularly used to host numerous other revenue generating events (i.e., concerts), and Lansdowne Park, the City's largest facility, is truly multi-use, hosting major sporting events, as well as entertainment and trade and consumer shows.

Notwithstanding, there is a limit to the uses and adaptability of facilities, and clearly no single facility that well serves all of the above requirements. Arenas for example (even NHL sized) have limited floor space and so do not function well as Exhibition Facilities. On the other hand, Exhibition Facilities are not typically designed with seating in mind and thus have limited adaptability for entertainment uses.

Another important element is the design and use of facilities for a range of sports and participants. In Ottawa, most public sports facilities are designed to be used for a broad range of sports and users, whereas private professional sports facilities (like Scotiabank Place) are designed first and foremost for a single professional use. The same holds for other facilities designed for professional teams. Professional soccer stadiums for example are usable for non-professional soccer but not readily usable for other sports, such as football.

The above serves to emphasize that within any community there will be various facilities and facility requirements, and moreover while some facilities are adaptable no single facility can well accommodate all uses/users. This implies a need for multiple facilities, and equally a requirement to prioritize needs.

1.4.3 Ownership

Facility ownership and operation varies with some being publically owned, some private and some a combination. In Ottawa, sports facilities are mostly publically owned, the exception being the privately owned Scotiabank Place, and some recently built arenas which are structured as public-private-partnerships (P3s).

Ownership of Entertainment and Exhibition facilities includes those which are public and privately owned, and in Canada, Convention Centres tend to be publically owned/non-profits.

Economic viability of sports and entertainment facilities is a different subject and one of much debate. From a straight operating standpoint (revenues vs. expenses) most are not profitable. However, they are seen as contributing to quality of life and providing an important community amenity that is "worth" the public cost. In the case of convention facilities, they are typically seen as generating economic impact and benefits in the larger community which outweigh their operating losses.

2.0 City Of Ottawa, Facilities Overview

2.1 Facilities

Ottawa, as the Nation's Capital, is recognized as having an exceptional quality of life with a cultural diversity that is not typically found in cities of similar size. At the national level, facilities here include numerous institutions and museums such as the National Arts Centre, the Canadian War Museum, and many others.

In terms of Sports and Entertainment Facilities, the City has a significant complement of facilities ranging from neighbourhood arenas and community centres, all the way up to those which host professional sport teams and international entertainment events. Within these extremes there is a broad range of public and private sports and entertainment facilities.

Key facilities located in the City of Ottawa are listed below, by category of facility.

Sports Facilities:

- Lansdowne Park;
- Scotiabank Place;
- University and College (Carleton, Ottawa U and Algonquin) Sports Facilities;
- Nepean Sportsplex;
- Ottawa Rapidz Stadium;
- Terry Fox Athletic Centre;
- Sports Domes (OZ Dome, Superdome, Ben Franklin SuperDome, Thunderbird, etc);
- Bell Sensplex;
- Terry Fox Athletic Facility;
- Nepean Equestrian Park;
- Yacht and Rowing Clubs (Britannia, Nepean Sailing Club, etc).

Entertainment Facilities:

- CentrepoinTE Theatre;
- Rideau Carleton Raceway;
- Lansdowne Park;
- Scotiabank Place.

Exhibition Facilities:

- Lansdowne Park.

Convention Centres:

- Ottawa Congress Centre.

Major facilities are profiled in **Appendix A**, according to the facility categories presented in Section 1.4.

2.2 Events and Facility Needs

Discussions with stakeholders and a review of facilities and their usage yielded the following:

Sports Facilities

- Research and comparison to other cities clearly shows that Ottawa has an impressive mix of public and private sports facilities;
- Usage of most facilities is very high, indeed most community level sports facilities are fully subscribed during peak playing periods;
- Discussions with stakeholders and a review of facilities in other locations/cities did not identify major facility gaps in Ottawa, although clearly the City is growing and this is putting pressure on existing facilities and yielding demand for new/expanded facilities. Indeed, numerous stakeholders believe the City has reached the point where it can support and requires a new major multi-use facility, and that the City should promote and/or participate to support initiatives in this regard;
- Numerous stakeholders specifically identified a need for additional soccer facilities in Ottawa, particularly at the professional level. A facility of this sort would clearly be needed in the event professional soccer was initiated in Ottawa;
- A key issue for Sports Facilities in Ottawa is the age and condition of its existing facilities and the need to modernize and/or expand facilities. While individual facilities have not been reviewed as part of this project, clearly condition and functionality varies significantly. Some like the Sensplex are new, modern in function and in excellent condition. Others, notably Lansdowne Park, are older, in poor condition and lag considerably in condition and functionality compared to what exists in other markets;
- Numerous of the City's arenas and sports complexes are 20–30+ years old and will require modernization, expansion and/or replacement within the short to medium terms if they are to continue to effectively function. This includes both major sports facilities at Lansdowne Park - the Civic Centre and Frank Clair Stadium.

Entertainment Facilities

- The City includes several public and privately owned concert halls and theatres (e.g., CentrepoinTE Theatre), and numerous sport facilities are often used to host concerts and other events;
- Those active in this sector report no significant issues with respect to the number, type and location of entertainment facilities in Ottawa;
- Overall, area facilities are seen as being capable of accommodating various types and sizes of events and stakeholders report no major events by-passing Ottawa because of a lack of appropriate facilities.

Exhibition Facilities

- The major Exhibition Facility in Ottawa is Lansdowne Park. Despite its multiple building configuration, age and functional challenges, this facility is still the largest and most widely used facility for major consumer and trade shows held in the City;
- There is currently strong demand for this facility, although largely this reflects the lack of alternatives in the marketplace, as no other facility offers the total exhibition area available at Lansdowne (almost 100,000 square feet);
- With only this much exhibition space, Ottawa is clearly on a lower tier compared to other major Canadian cities. Cities such as Regina and Saskatoon can provide more space than Ottawa, and the International Centre in Toronto for example offers close to 1.0M square feet.
- Lansdowne does not offer modern exhibition space, and according to stakeholders it also does not offer sufficient space;
- A modern exhibition facility in the range of 150,000 to 200,000 is seen as being needed in the City of Ottawa to host consumer and trade shows;
- In terms of facility gaps therefore, stakeholders report the lack of a modern Exhibition Facility as a major issue and limitation for Ottawa; and
- The redevelopment of the Ottawa Congress Centre is not seen as fulfilling this need, as the two mostly serve different markets – an Exhibition Hall largely caters to locals, whereas a Convention Centre is designed to attract mostly non-local events.

Convention Centres

- The Ottawa Congress Centre has recently announced a major renovation and expansion which will double its size to approximately 140,000 square feet;
- The lack of a larger and modern Convention Centre was seen for many years as a shortcoming in Ottawa; and
- The expanded and modernized Congress Centre facility will enable Ottawa to more effectively compete for Conferences and Conventions, and with this facility underway, this gap is seen as being filled.

2.3 Impacts

There exists considerable literature dealing with importance of quality of life elements to fostering creative cities and communities, attracting skilled workers, providing direct economic spinoffs in terms of jobs, promoting tourism, visitor spending, tax revenues, etc. A recent Conference Board of Canada report estimated that the arts and culture sector represented about \$46 billion or 3.8% of Canada's Gross Domestic Product in 2007¹. With indirect effects, the contribution to GDP is about \$84.6 billion or 7.4% with 1.1 million jobs affected.

Nevertheless, Ottawa is still faced with significant issues and challenges in this area as was evidenced by the challenges in obtaining support and funding for a proposed Concert Hall. Indeed, despite all of its institutions and facilities, Ottawa is still a lower tier destination for

¹ Conference Board of Canada, News Release, August 26, 2008: "Arts and Cultural Industries Add Billions of Dollars to Canadian Economy" www.conferenceboard.ca

conferences and major events. In fact, of the 50 largest tradeshows in Canada in 2007, none were held in Ottawa.² However, the soon to be expanded Ottawa Congress Centre is expected to significantly improve the City's competitive position in this area, when it opens in 2011.

Several economic impact studies have been completed for recent events held in Ottawa. The purpose of these studies has typically been to show how such events contribute to the local economy in terms of employment, visitor spending and taxes. Selected recent events and their impacts are identified as follows:

- FIFA U-20 World Cup: The Canadian Sport Tourism Alliance (CSTA) completed an economic impact study of the FIFA U-20 World Cup Canada 2007 event held in 6 Canadian cities including Ottawa during July 2007 which attracted about 29,300 local spectators and 11,600 out-of-town visitors. The study estimated that visitor expenditures related to the Ottawa hosted games totalled \$4.7 million which in turn generated \$3.1 million in GDP for Ottawa. About \$2.4 million in wages and salaries were also generated supporting another 66 (full year) jobs.
- Bell Canada Cup Hockey Tournament: CSTA also completed an economic impact analysis of the Bell Capital Cup (hockey tournament) hosted in Ottawa during December/January, 2004/2005.³ The event took place at 20 venues across the City attracting approximately 13,000 spectators and 4,200 hockey tournament athletes from outside the city. The combined expenditures of visitors, event operations and capital expenditures were estimated to total \$4.9 million which in turn generated \$4.9 million in new economic activity (GDP), \$3.5 million of which was retained within the city's economy. Nearly \$2.5 million in wages and salaries were paid in Ottawa supported an estimated 130 jobs.
- 2006 Ontario Summer Games: According to City of Ottawa estimates, the 2006 Ontario Summer Games in Ottawa saw more than 3,100 people participating, including athletes, coaches and officials and the total economic impact of the Games on the local economy exceeded \$3 million.⁴
- The 2004 Grey Cup: This single event attracted about 100,000 people to the festivities including 50,000 from outside the City generating an estimated \$43 million in economic benefits.⁵

An economic impact study was also completed recently for Lansdowne Park, to quantify the economic impacts/benefits this multi-purpose facility has on the community. The purpose of this study was to assess the direct, indirect, and induced economic impacts, as well as the employment and personal income impacts of Lansdowne Park and its associated programming and special events. The study (conducted by the Corporate Research Group in Association with the Conference Board) found that:

- Visitors, drawn to events at Lansdowne Park, spent an estimated \$11.8 million outside of Lansdowne Park in other parts of the Ottawa during 2006.⁶

² Source: Tradeshow Week, April 2008.

³ Canadian Sport Tourism Alliance, "Economic Impact Assessment: 2005 Bell Capital Cup", www.canadiansporttourism.com

⁴ City of Ottawa September 27, 2006. City Council Meeting Agenda, Corporate Services and Economic Development Committee Report 54 (Item 7: 2008 Ontario Summer Games – Ottawa Bid).

⁵ Canadian Football League (CFL) Ottawa Renegades Press Release, "2004 Grey Cup Wins Ottawa Tourism Event of the Year Award". March 3, 2005. www.oursportscentral.com

- A further \$18.1 million in spending by patrons at events occurring at Lansdowne Park (representing business revenues for resident tenants, resident service partners and transient business partners operating within the grounds of Lansdowne Park);
- The economic impacts generated by the estimated \$36.3 million in spending associated with Lansdowne Park resulted in 529 full-year jobs across Ontario, 447 within Ottawa⁷.
- This level of employment represented a combined payroll \$19.6 million for residents of Ontario, \$15.4 million for residents of Ottawa.
- In addition, the business activity generated by Lansdowne Park supported a total of \$15.0 million of taxes. Of those taxes supported, \$6.7 million was destined for the federal government, \$6.4 million for the province of Ontario and approximately \$1.6 million for municipal coffers in Ottawa.
- The economic impacts associated with Lansdowne Park are summarized in the following table (Table 2.1):

Table 2.1 Summary of Economic Impacts – Lansdowne Park Operations		
Lansdowne Park Administration	\$5.4M	
Lansdowne Park Capital Budget	\$1.0M	
Attributed visitor spending outside Lansdowne Park	\$11.8M	
Other business revenues operating at Lansdowne Park	\$18.1M	
Total business revenues attributed to Lansdowne Park (Combined)	\$36.3M	
	Total Province of Ontario	Ottawa Region
Impact Of Total Attributed Business Revenues		
Employment (Full-year jobs)	529	447
Wages and Salaries	\$19.6M	\$15.4M
Taxes (All levels of government)	\$15.0M	\$1.6M (Municipal share only)

Source: Canadian Tourism Research Institute, Ottawa TEAM.

Table 2.2 provides a historical summary of events and attendance for Lansdowne Park. A review of the trends provides insight on the changes occurring in the local social/cultural/entertainment sector. The table shows that total attendance and number of activities show considerable year-to-year variation with no apparent long term trend. The table also shows no strong relationship between the total number of activities and total attendance.

The data also shows a significant increase in the number of major events overall when the post 2002 years are compared to the previous years. The drop in major events in 2002 is likely due to the impact of 9-11 events on world wide travel in general. However, although there has been a general increase in number of major events the total days associated with these events have not changed noticeably over the 11 year time period.

⁶ Based on average visitor spending profiles as reported in Statistics Canada's CITIES project (2004) and adjusted to reflect 2006 levels based on inflation in travel prices.

⁷ Includes direct, indirect and induced impacts.

**Table 2.2
Lansdowne Attendance / Events: 1998-2008**

Year	Total Attendance (000s)	Total Attendance Excluding Central Canada Ex (000s)	Total # Activities	Total # Major Events	Total # Major Event Days
1998	1,383	770	1,774	230	174
1999	1,491	823	1,952	254	213
2000	1,300	706	2,785	256	219
2001	1,550	n.a.	1,897	204	196
2002	1,350	725	1,971	185	185
2003	1,688	1,135	2,397	255	208
2004	1,388	888	2,018	385	174
2005	1,551	906	2,252	360	172
2006	1,320	791	2,239	376	187
2007	1,101	735	2,422	356	164
2008 (Jan to Aug)	840	430	1,125	175	106

Source: City of Ottawa, Lansdowne Park Administration

Note: Activities includes any activity that occurs at Lansdowne Park including set up days for events. A major event consists of a minimum of 1,500 attendees.

3.0 Demographic Issues and Impacts

The following section provides a demographic profile of Ottawa including growth projections as context for understanding requirements for sports and entertainment facilities. The analysis provides a review of population, income and other relevant indicators.

3.1 Population/Demographic Profile and Trends

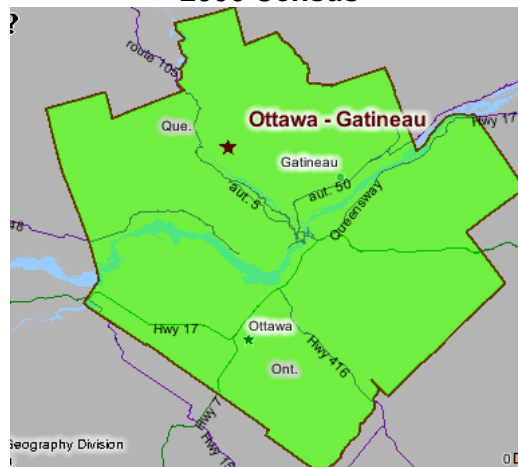
According to the 2006 Census, the population of the Ottawa-Gatineau Census Metropolitan Area (CMA) was 1,130,761 making it the fourth largest metro region in Canada behind the Toronto CMA (5,113,149), Montreal (3,635,571) and Vancouver CMA (2,116,581) but only slightly ahead of Calgary CMA (1,079,310) and Edmonton CMA (1,034,945). The 2006 populations for the individual municipalities that comprise the Ottawa-Gatineau CMA are shown in Table 3.1. The Geographic boundaries for Ottawa-Gatineau are shown in Figure 3.1.

Table 3.1 2006 Census Population: Ottawa-Gatineau CMA and Components	
	2006 Population
Ottawa-Gatineau CMA	1,130,761
1. Ottawa (Ont. Part)	846,802
1.1 City of Ottawa	812,129
1.2 Rest Ont. Part¹	34,673
2. Gatineau (Que) par	283,959

Source: Statistics Canada 2006 Census

(1) Includes Clarence-Rockland (20,790) and Russell Township (13,883)

**Figure 3.1
Geographic Boundary: Ottawa-Gatineau CMA
2006 Census**



Source: Statistics Canada

Ottawa-Gatineau CMA's total population increased by about 63,000 or 5.9% between 2001 and 2006, which was slightly lower than the increase between 1996 and 2001, approximately 65,000 (6.5%) Ottawa-Gatineau's population growth rate was below both the provincial and national

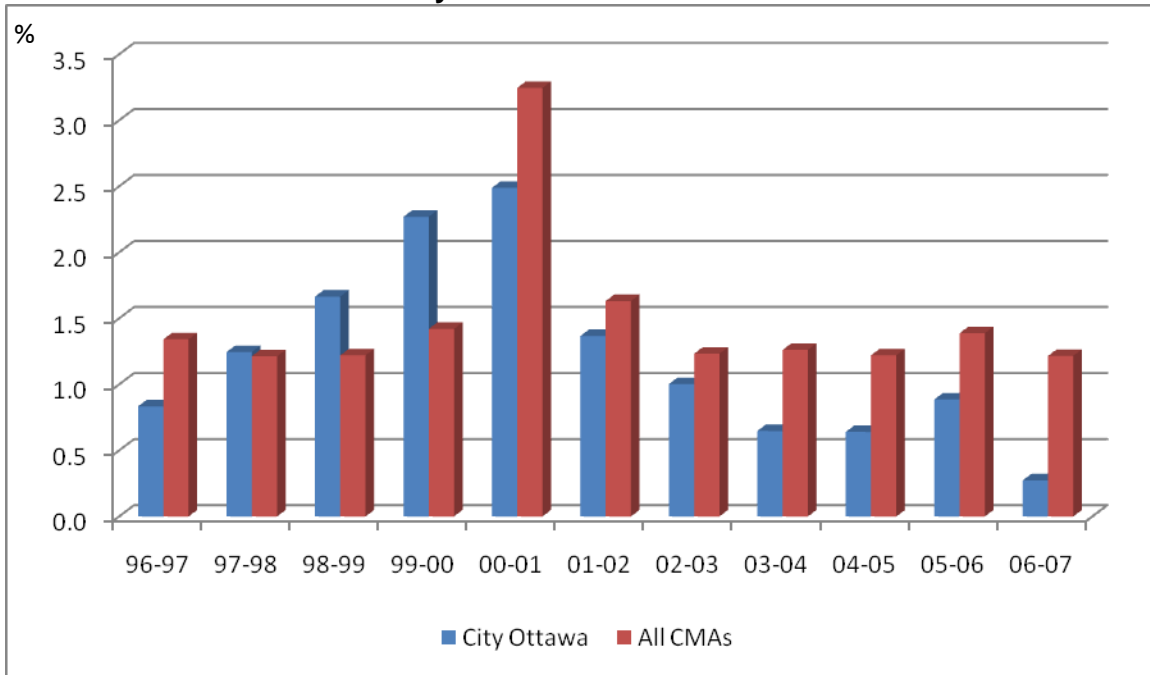
growth rates between the last two census years and generally slipped when compared to other CMAs as well as Ontario and Canada over the last 2 five year census intervals – see Table 3.2.

Table 3.2			
Comparison of Population Growth Rates: 1996, 2001, and 2006 Census CMAs Over 500,000 Population, Ontario, Canada			
CMA	2006 Population	1996-2001 % Change	2001-2006 % Change
Ottawa-Gatineau CMA	1,130,761	6.5	5.9
- City of Ottawa	812,129	7.3	4.9
Toronto CMA	5,113,149	9.8	9.2
Montreal CMA	3,635,571	3.0	5.3
Vancouver CMA	2,116,581	8.5	6.5
Calgary CMA	1,079,310	15.8	13.4
Edmonton CMA	1,034,945	8.7	10.4
Quebec CMA	715,515	1.6	4.2
Winnipeg CMA	694,688	0.6	2.7
Hamilton CMA	692,911	6.1	4.6
Ontario	12,160,282	6.1	6.6
Canada	31,612,897	4.0	5.4

Source: Statistics Canada, 1996, 2001, 2006 Census

Statistics Canada's population estimates for the intercensal years also show Ottawa's overall lower than average population growth rates over the past decade. The City of Ottawa's average annual population growth rate between 1996 and 2007 was 1.2%, the same as the total Ottawa-Gatineau rate. The annual average for all CMAs in Canada was 1.5%. The only year that Ottawa had a higher growth rate than the combined total CMA rate was between 1997 and 2000 at the peak of the advanced technology boom – see Figure 3.2. The federal government sector also experienced strong job gains in the latter part of this time period.

Figure 3.2
Annual Population Growth Rates: 1996-2007
City of Ottawa vs. All CMAs

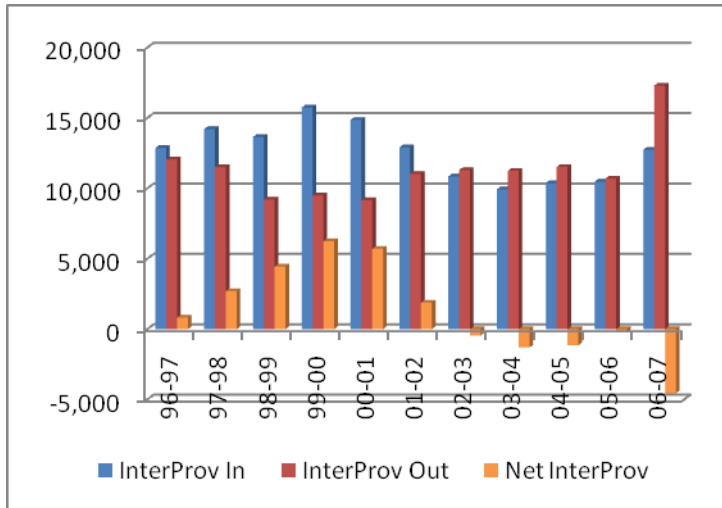


Source: Statistics Canada, Table 051-0036.

The following series of charts show that the City of Ottawa experienced strong net gains during the second half of the 1990s in terms of people migrating to the City from other Provinces and international countries. Since about 2001/02 however, the City has experienced a net loss of population to other Provinces particularly in 2006/07 which may reflect the movement of labour to the booming economies of Western Canada, combined with a weaker local market – particularly in high technology.

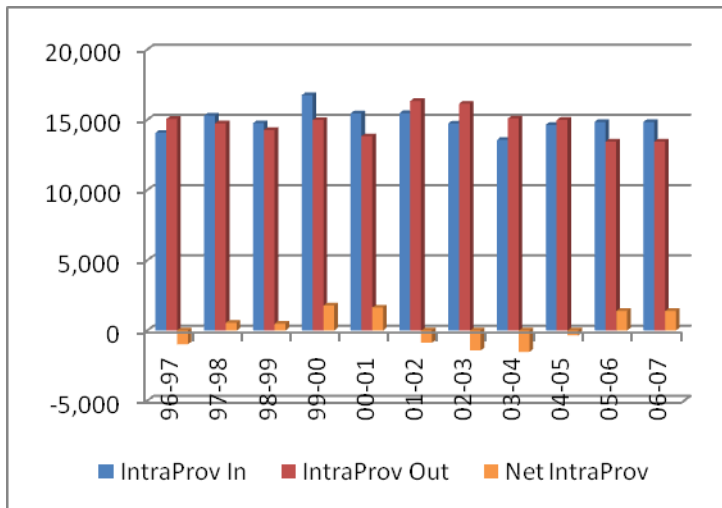
On the other hand, net international migration has remained positive although it has steadily decreasing since the 2000/2001 peak. In- and out-migration flows with the rest of Ontario show relatively consistent yearly levels since 1996 and generally cancel each other out in terms of people moving to and leaving the City.

Figure 3.3(a)
Migration From and To Other Provinces: City of Ottawa
1996-2007



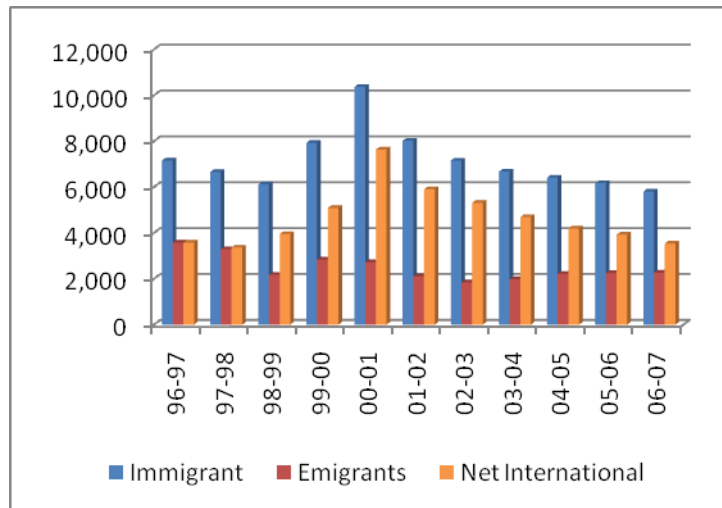
Source: Statistics Canada, CANSIM Table 051-0035

Figure 3.3(b)
Migration From and To Rest Ontario: City of Ottawa
1996-2007



Source: Statistics Canada, CANSIM Table 051-0035

Figure 3.3(c)
International Migration: City of Ottawa
1996-2007



Source: Statistics Canada, CANSIM Table 051-0035

As the Nation's Capital, the federal government strongly influences the health of the local economy. It also influences the social and demographic profiles of the resident population in terms of the demand for skills and other qualifications such as education and income characteristics of government workers. The following table (Table 3.3) compares selected social and economic profile elements that illustrate important differences between Ottawa and other Canadian metropolitan areas including socio-economic characteristics that may in turn influence local demand for arts/cultural/recreational/entertainment facilities

- **Income and Education:** The table shows that Ottawa's median/average incomes for the various population members are significantly higher when compared to other major CMAs. This reflects the concentration of federal workers in the Ottawa region as well as the cluster of advanced technology firms. High income levels are also mirrored by the fact that Ottawa has also the highest percentage of total population with university degrees, diplomas or certificates;
- **Recreation Expenditures:** The table also provides average yearly expenditures on recreational activities and on this measure Ottawa reported \$5,078 per household – higher than most other metro areas except for Calgary and Edmonton.

Table 3.3
Comparison of Socio Economic Profiles
Ottawa vs. Other Selected Canadian CMAs

	Census Metropolitan Area								Canada
	Ottawa	Gat.	Tor.	Mon.	Van.	Cal.	Edm.	Qué.	
Median Income – Married Couples (2005) ¹	\$95,660	\$80,350	\$79,969	\$66,503	\$70,601	\$88,836	\$85,538	\$71,000	\$71,665
Median Earnings Persons working Full	\$52,265	\$46,142	\$45,350	\$39,419	\$43,215	\$46,189	\$44,515	\$38,851	\$41,401

Time all year ¹									
Ave Annual Federal Govt. Employee Income (2007 est'd) ²	\$66,180		\$55,898	\$54,858	\$57,728	\$54,848	\$55,165	\$55,570	\$59,632
Median Total Income – All Taxfilers 2006 ³	\$35,200	\$33,300	\$30,100	\$27,100	\$26,000	\$34,400	\$31,900	\$28,200	\$26,500
% Taxfilers With Total Income .80 K - 2006 ³	15%	8%	10%	7%	9%	15%	12%	6%	6%
1-person Households as % of Total Private Households ¹	27.0	27.0	22.3	31.6	28.4	24.9	26.4	32.9	26.8
Immigrants As % Total Population ¹	22.5	8.1	47.2	21.8	41.5	24.7	19.4	3.7	20.7
% Total Population .15 Yrs. With University Degree / Diploma ¹	31.6	19.8	26.7	21.0	24.6	24.7	18.3	20.2	18.1
% Total Population with Knowledge of Both Official Languages ¹	38.3	62.4	8.2	51.9	7.8	7.9	7.6	33.0	17.4
Median Age of Total Population ¹	38.4	38.2	37.5	39.3	39.1	35.7	36.4	41.7	39.5
Average Household Yearly Expenditure on Recreation 2006 ⁴	\$5,078	--	\$4,238	\$3,159	\$3,692	\$6,069	\$6,084	\$2,760	\$3,975

1: Source: Statistics Canada, 2006 Census

2: Source: Statistics Canada, CANSIM Table 183-0003. Estimated by dividing the total salaries and wages by the total number of federal employees published by Statistics Canada for the month of September, 2007 and then multiplying by 12 to obtain annual total. Data available only for Ottawa-Gatineau CMA. Average for Canada is the average for all CMAs.

3: Source: Statistics Canada, CANSIM Table 111-0041

4: Source: Statistics Canada, CANSIM Table 203-0001. Recreation expenditures includes 78 items ranging from video games, computer equipment, televisions and home theatre equipment, purchase of recreational vehicles and bicycles to spending at movie theatres, sporting events and memberships for recreational facilities.

City of Ottawa staff recently revised the City's population projections as part of its Official Plan review. Three growth scenarios have been developed in the draft projections. The medium Scenario 2 has been selected as the "Reference Scenario" for the Official Plan review (subject to Council approval). Scenario 2 sees net migration increasing by 4% every 5 years – increasing from 7,600 to 8,900 per year through the projection period. This results in a population of 1,136,000 by 2031 representing an increase of 265,000 from 2006, the base year. In comparison, the population projections under Scenarios 1 and 2 are 1,057,000 and 1,207,000 respectively.

Significant demographic trends identified by the City are summarized below:

- The aging of the baby-boom: this continues to be the most significant local (and national) demographic force. The population aged 65 and over will account for almost 50 per cent of our population growth to 2031. The share of population 65 and over will increase from about 12 per cent in 2006 to slightly over 20 per cent by 2031;

- Declining numbers in younger age groups: Age groups 14 and younger are projected to increase by only 5.4 per cent by 2031, and to decline in total numbers over the coming decade and in the longer run will mean a smaller pool of replacements for the impending wave of retirees;
- The demographic dependency ratio: The number of children (14 and under) and seniors (65 and over) per 100 working age people (15 to 64) will increase significantly, from 42 per 100 in 2006 to 54 by 2031.8; and
- Net migration: This will be the primary source of population growth as natural increase will almost equal deaths by 2031. Migration from other countries is expected to account for close to all of the net migration and, therefore, all population growth by 2031.

The City projects that the five-year interval population growth rates will decline steadily over the next 25 years as shown in Table 3.4, follows:

Table 3.4 Projected Population Growth Rates and Age Distribution City of Ottawa: 2006-2031 (Scenario 2)						
		2006-2011	2011-2016	2016-2021	2021-2026	2026-2031
Projected 5-Year Growth Rates		6.0	5.8	5.6	5.2	4.7
% Distribution by Age Groups						
	2006	2011	2016	2021	2026	2031
65+	11.9%	12.8	14.5	16.4	18.5	20.3
50-64	17.8	19.8	20.7	20.3	19.3	18.8
35-49	24.6	23.1	22.2	22.3	22.6	22.5
20-34	21.8	22.0	21.7	20.8	19.8	18.6
0-19	23.9	22.3	20.9	20.2	19.9	19.7

Source: City of Ottawa, "Growth Projections for Ottawa: 2006-2031" (2008)

The City's Draft Population Projections also include estimates for the Greater Ottawa –Gatineau Area which includes Ontario / Quebec Municipalities Adjacent to Ottawa/Gatineau (OMATO and QMAG) and are summarized in Table 3.5. Overall, the projections do not show significant shifts in the distribution of population growth over the forecast period. The City of Ottawa's share of total population in the Greater Ottawa-Gatineau Area is projected to decline from 66.6% in 2006 to 65.5% in 2031 while OMATO's share increases from 10.8% to 12.7%. The City of Gatineau's share also drops from 18.9% to 17.9% while QMAG's share goes up from 3.6% in 2006 to 4.0% in 2031.

⁸ Source: The City of Ottawa, "Growth Projections for Ottawa: 2006-2031" (2008) www.ottawa.ca
(http://ottawa.ca/residents/statistics/new_growth/projections/index_en.html)

Table 3.5
Projected Populations for the Greater Ottawa-Gatineau Area
(Scenario 2)

	2006 (Base Year)	2011	2016	2021	2026	2031
City Of Ottawa	870,760	923,000	976,800	1,031,300	1,085,300	1,135,800
OMATA	139,809	149,700	166,000	183,300	201,300	219,700
City Gatineau	249,374	262,400	275,300	288,000	299,800	309,700
QMAG	47,161	49,900	54,300	59,000	63,800	68,600
Total Greater Ottawa-Gatineau Area	1,307,104	1,385,000	1,472,400	1,561,600	1,650,300	1,733,800

Source: City of Ottawa, "Growth Projections for Ottawa: 2006-2031" (2008)

From an overall national perspective, population growth will continue to be concentrated in only a few larger regional or metropolitan centres. The aging of the baby boom population will also significantly impact all urban communities and in-migration and in particular, immigration, will be the dominant component of population growth. As shown in Table 3.6, the single largest concentration of immigrants in Canada is in the Toronto CMA (37.5% of all immigrants in Canada live in this CMA). Toronto's share of immigrants moving to Canada over the last 15 years is even larger – 42.9%. Vancouver also shows up as an important location for immigrants. Generally, the remaining CMAs including Ottawa have similar shares of immigrant population relative to population size. For Ottawa, immigrants accounted for 21.5% of the total population in 2006, higher than Montreal which is often perceived as an attractive city to immigrants but lower than Calgary and Hamilton. Hamilton's higher share reflects the large immigration that came to the City in the years following the Second World War.

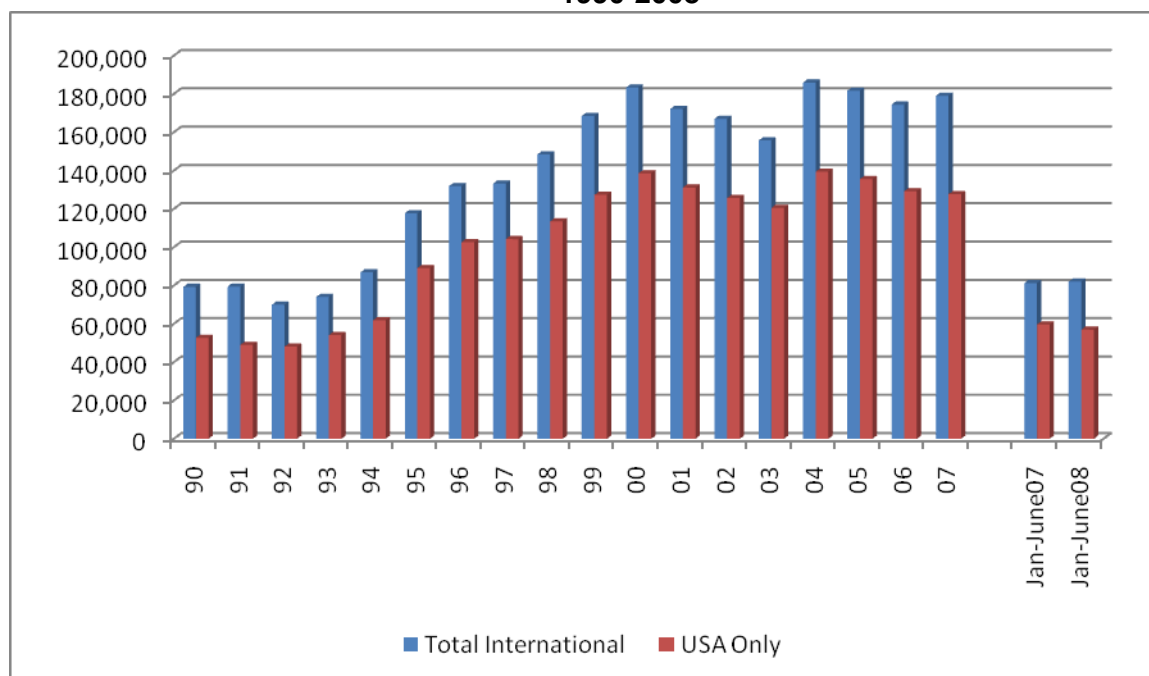
Table 3.6
Distribution of Immigrant Population

CMA	% Total 2006 Population		% Canada Total 2006		
	All Immigrants	Immigrants To Canada Between 1991 and 2006	Total Population	All Immigrants	Immigrants To Canada Between 1991 and 2006
Ottawa	21.5	9.9	2.7	2.9	3.0
Ottawa-Gatineau	18.1	8.5	3.6	3.3	3.4
Toronto	45.7	23.0	16.2	37.5	42.9
Montreal	20.6	9.9	11.5	12.0	12.8
Vancouver	39.6	21.1	6.7	13.4	15.9
Calgary	23.6	11.7	3.4	4.1	4.5
Edmonton	18.5	7.4	3.3	3.1	2.7
Quebec	3.7	2.3	2.2	0.4	0.6
Winnipeg	17.7	6.7	2.2	2.0	1.7
Hamilton	24.4	8.0	2.2	2.7	2.0

Source: Statistics Canada, 2006 Census

The population size and demographic/income characteristics of a city are important factors influencing domestic or local demand for cultural/entertainment/sports/arts facilities. Another key factor is the attractiveness of a city to outside visitors which impact on 'higher order' facilities like convention centres. Figure 3.4 shows the total annual non Canadian passengers landing at the Macdonald-Cartier International Airport from 1990 to 2008 (2008 passengers are for the first 6 months). International passenger traffic increased steadily between 1993 and 2000 and then declined for 3 years following the 9/11 terrorist attacks in 2001. International traffic increased sharply in 2004 following the opening of the new terminal and has remained relatively steady since then. However, passengers from the United States have steadily dropped after recovering in 2004 partly because of the escalating value of the Canadian dollar relative to the US dollar. The Airport new Terminal opened in October 2003 with the Phase Two expansion opening in March 2008.

Figure 3.4
Total Annual International Travelers: Macdonald-Cartier International Airport
1990-2008



Source: Statistics Canada, CANSIM Table 427-0001

Table 3.7 compares the total number of international travelers to airports at selected major Canadian cities. According to the table, Ottawa shows as a lower tier destination in terms of international visitors to the City ranking well below Toronto, Vancouver, Montreal and Calgary.

Table 3.7					
Comparison of International Travelers by Selected Airport Destinations					
1990, 2000 and 2007					
	Total International Travelers				
CMA/Airport	1990	2000	% Change 1990-2000	2007	% Change 2000-2007
Ottawa ¹	79,307	183,353	112.4%	179,065	-2.3
Toronto ²	2,146,583	3,290,789	53.3	3,039,414	-11.3

Montreal ³	912,666	1,260,913	38.2	1,327,218	3.0
Vancouver	956,911	1,991,633	108.1	2,114,700	1.3
Calgary	233,966	565,464	139.0%	671,135	18.7
Edmonton	75,458	84,349	11.8%	134,506	48.3
Winnipeg	69,495	92,490	33.1	92,183	5.2
Québec ⁽⁴⁾	13,008	30,689	135.9	58,468	73.7

Source: Statistics Canada, CANSIM Table 427-0001

(1) Macdonald-Cartier International Airport

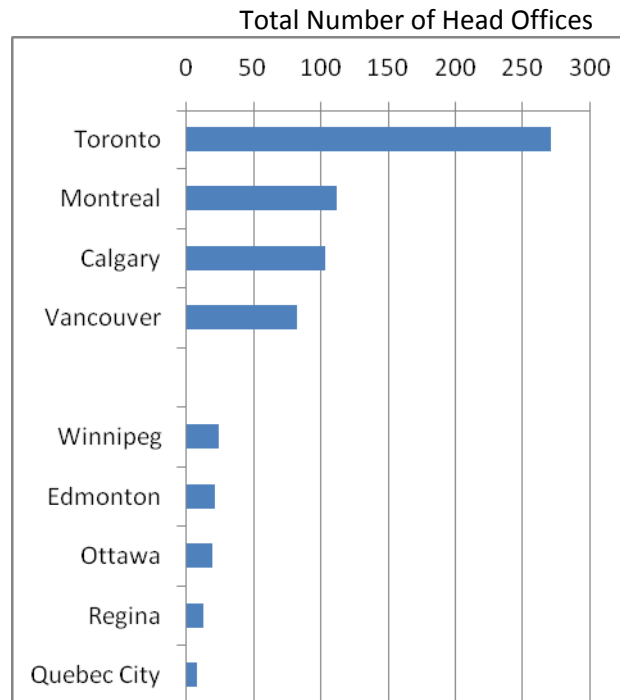
(2) Includes 3 Terminals and Toronto Pearson International Airport and Toronto Seaport/Island Airport

(3) Includes Pierre Elliot Trudeau and Mirabel airports.

(4) Jean-Lesage International Airport

The challenges faced by the proposed Concert Hall on City-owned lands at Gloucester and Elgin to obtain private funding have been identified by local community leaders as illustrative of the lack of private large corporations in supporting public cultural projects. The distribution of head office locations of the largest Canadian corporations is shown in Figure 3.5. The chart clearly shows that Ottawa is a relatively less important urban centre in terms of head office locations. Ottawa is the home of 20 head offices of Canadian corporations. Moreover, 8 out of the 20 head offices are public companies or Crown Corporations (for example, CMHC, Bank of Canada, Export Development Corporation).

Figure 3.5
Head Office Location of Financial Post's
800 Largest Canadian Corporations



Source: Financial Post Magazine (2007)

www.financialpost.com/magazine/fp500/index.html

4.0 Facilities Scan

4.1 Context

As part of the larger assessment of Ottawa's "need" for multi-purpose sports and entertainment facilities, CRG conducted a Facilities Scan. The purpose of this Scan is to determine if new multi-purpose sports and entertainment facilities have been developed and/or if any recent studies have been conducted to determine needs for facilities in comparable major cities in Canada and in the United States.

In completing this Facilities Scan, CRG conducted a comprehensive search using a variety of sources. For facilities identified, the following were reviewed:

- Details of the facility in terms of its size, use, events and users;
- Drivers for the existence of the facility;
- Funding models used; and
- Factors in determining locations.

The analysis is augmented and complements research conducted by City Staff (Summary of Major League Soccer – MLS, Stadiums, Economic Development Division, October 2008); see Appendix G and focuses mostly on larger facilities (accommodating 20,000 or more spectators) and/or multi-use sport and entertainment facilities. The relevance of these latter facilities is mostly in terms of their funding strategies, and the drivers behind their locations which are essential considerations for any decision with respect to a multi sport and entertainment facility.

4.2 Observations

The results of the scan show a trend towards grouping professional and higher level sports with both entertainment and community uses. This is an effort to create efficiencies and synergies and to respond to a mix of professional and community needs.

New facilities tend to be spawned by a combination of major events (e.g., Olympics and associated funding) and/or municipal needs or private sector interest.

From a locational standpoint, the Scan identified that most new facilities are being developed in central urban neighbourhoods, and as catalysts for renewal and broader redevelopment. Developing one or a group of facilities outside the urban core in generally undeveloped areas was commonplace in the past, but is no longer prevalent.

While the original motivating factors and type of athletic facility/entertainment facility may vary from city to city, those city's that have moved forward with the construction of large sport and entertainment facilities have used the opportunity as a catalyst to enhance the community. These facilities have invariably formed a part of a larger and more comprehensive development that either is breathing new life into degenerated city centers through comprehensive development plans or creating vibrant community gathering places that respond to both the needs of professional entertainment and sport and to those of the surrounding community.

4.3 Canadian Comparisons

The following Canadian multi purpose sports and entertainment facilities have either been constructed within the last 5 years or are being considered for construction in the near future, and are therefore studied herein:

- City of Edmonton hockey arena: The City has just completed a study to consider the benefits of constructing a new sports and entertainment facility (with an 18,000 seating capacity arena as its focus) that would replace the Rexall Place arena, home to the Edmonton Oilers. The study examined the opportunity of integrating such construction into renewal plans for Edmonton's downtown.
- City of Richmond, The Richmond Oval: This is a 32,000 square metre indoor facility currently being constructed that will host a long track speed skating oval with seating for 8,000 spectators during the 2010 Winter Olympics. Following the Olympics it will be converted to house a main activity area which will comprise an indoor sports field comprising ice, courts and turf. The ice section will have 2 Olympic sized ice rinks, the court section will be a hardwood surface able to host a variety of indoor sports and the turf section will have a rubberized turf surface for indoor running and other sport uses. The Oval will also house a community wellness center with a full array of sports medicine and sports sciences and related services, fitness center, restaurant and retail space.
- City of Vancouver, Whitecaps Soccer Stadium: A proposed open air soccer stadium to be located in Vancouver that would be privately funded and developed by/for the Vancouver Whitecaps FC. Proposed for 15,000 seats with the potential to expand to 30,000 seats. Its intent is to replace the current Whitecaps field at Swanguard Stadium. This facility is considered "one to watch" as it has not yet obtained approval for its location which is being sought on the central waterfront in Vancouver.
- City of Montreal, Saputo Stadium: A 12,531 seat soccer specific stadium recently constructed in downtown Montreal, and opened May of 2008. The stadium construction allows for expansion of the seating capacity to 18,000 seats. The facility includes the soccer stadium as well as two indoor fields and one outdoor practice field, all adjacent to Olympic Park.
- City of Toronto, BMO Field: A soccer specific 20,000 seat stadium opened in 2007 at Exhibition Place, Downtown Toronto. It is home to Canada's National Soccer Team as well as the Toronto FC, Canada's first Major League Soccer team and is Canada's first soccer-specific stadium.
- City of Mississauga, The Hershey Sport Zone: A multi-sport facility that opened in 2007 immediately adjacent to an existing arena (the Hershey Centre arena). The Hershey Sport Zone houses a full sized indoor soccer field, a full sized basketball court, a gymnastics facility and two outdoor soccer fields.
- City of Halifax, Mainland Common Center: A multipurpose facility located in the City of Halifax, a major expansion is proposed for 2010.
- City of Winnipeg, MTS Centre: a new 15,000 seat indoor arena and sports and entertainment facility built recently and located in downtown Winnipeg.

4.4 U.S. City Examples

The following U.S. based multi purpose sports and entertainment facilities have either been constructed within the last 5 years or are being considered for construction in the near future, and are therefore studied herein:

- City of Los Angeles, Staples Center: A multi-purpose facility that accommodates hockey, basketball and numerous other sports, entertainment, and concert events.
- City of San Diego, PetCo Baseball Stadium: A new 42,445 seat open air baseball stadium in downtown San Diego that is part of a multi-use sport and entertainment venue.
- City of Columbus, Nationwide Arena: An 18,500 seat NHL hockey arena and entertainment facility located in downtown Columbus Ohio.
- City of Indianapolis: Multiple sport and entertainment venues.

4.5 The Canadian Experience

4.5.1 City of Edmonton, New Hockey Arena

a) Facility Details

While this facility has yet to be built, recent studies outline the proposed facility elements that are envisioned to create a viable, highly flexible, efficient multi-purpose community venue. These are as follows:

- 18,000 seat hockey arena;
- 35,000 sq ft practice ice sheet and facilities;
- 21,500 sq ft club lounge;
- 7,000 sq ft retail opportunities;
- 16,000 sq ft members restaurant;
- 7,500 sq ft commercial restaurant
- 10,000 sq ft administrative office

b) Drivers

The City of Edmonton formed a Leadership Committee to study the potential construction of a new sports and entertainment facility in the city of Edmonton. The assessment arose as a result of the convergence of a number of factors. Rexall Place, home to the Edmonton Oilers is one of the smallest and oldest sports venues in the NHL. The life and capacity expectancy of this facility has recently been studied and concluded that the cost to modernize the facility would be in the range of \$250 million. Further, the Oiler's lease at Rexall Place is set to expire in 2014.

The City decided it had an opportunity to integrate a new sports and entertainment facility into renewal plans for the City's downtown area. The City felt the development would draw large numbers of visitors, help revitalize the downtown, generate tax revenues through new housing, retail, office space, hotels, restaurants and additional facilities. The facility is envisioned to form a part of a multi-purpose/use activity district.

The study entitled “The Summary Report of the Leadership Committee for a New sports/Entertainment Facility for Edmonton” dated March 2008 (“Edmonton Report”) is attached as **Appendix B**.

c) Funding Model

This project has yet to proceed and a detailed analysis of a specific proposal has not yet been undertaken, however, studies conducted included an assessment of the range of financial tools, revenues and financing options that could be available to proponents of a sports/entertainment facility project.

The owners of the Edmonton Oilers have promised publicly to contribute \$100M towards a new downtown arena facility. A new facility would likely not be fully equity funded thus a wide range of financial tools needs to be considered. Revenues from the main arena and those from related or ancillary land and commercial developments need to be maximized. The City of Edmonton has stated they do not wish to see a tax increase from financing the facility nor does it want to reallocate funding for the City’s infrastructure. The role of the current owner of Rexall Place also needs to be considered in the decision with respect to a new facility.

A feasibility analysis was performed. The study concludes that a balanced model of both public and private participation would be the most effective and realistic approach. Particularly as this facility is seen as being the centre piece of an integrated downtown development plan and total private funding would limit the ability of the municipality to influence the nature and concept of the development and its impact on the downtown. The City also acknowledges that contributions from other levels of government will be needed in order to make the project economically viable. A finance subcommittee of the Leadership Committee assumed such contributions could be made through some of the following mechanisms:

- Infrastructure
- Land
- Grants
- Equity contributions
- Community revitalization levies

A more detailed review of the financial models is set out at pages 17-24 of **Appendix B**.

d) Factors in Determining Location

The timing of the need for a new arena converged with a desire by the City of Edmonton to rejuvenate its downtown core. The conclusion was reached by the Community and Design Subcommittee that *“if a new sports/entertainment facility is to be built it must serve the broader needs of the community and stimulate further development and revitalization.”* They concluded that it was essential the new facility be used to support downtown revitalization and development and not be treated as an isolated project. The facility is seen as being the anchor to a broader development project that will help stimulate revitalization of the urban district. Innovative design elements and integration into the context of the neighbourhood are seen as key components of ensuring economic, social and environmental sustainability. The needs of the prospective tenants of the facility are a key consideration, but the impacts on the surrounding neighbourhood, both positive and negative, also have to be planned for. Use of public transport and the encouragement of walkability in the overall design of the redeveloped are viewed as essential.

Additionally the downtown location was viewed as the correct location because it has existing infrastructure, parking capacity, superior transportation and transit access and a concentration of shops and restaurants that can provide the initial base for creating a walkable thriving urban district. Linkages to the existing community and businesses are a key component of the facility design in order to foster meaningful contact and a sense of comfort within the community.

4.5.2 City of Richmond-Richmond Oval

a) Details

The Richmond Oval is a recently constructed 32,000 square metre facility with seating for 8,000 spectators. The design includes support areas for athletes and spectators. Prior to the 2010 Olympic Winter Games, the Richmond Olympic Oval will be available for a variety of sport uses including hockey, figure skating and speed skating, as well as summer sports. During the Olympics the Oval will be used for speed skating. Following the Olympics it will be converted to host local and international sports, culture and special events in conjunction with community, recreational and commercial activity. The Oval will also house a community wellness center with a full array of sports medicine and sports sciences and related services, a major fitness center, restaurant and retail space.

b) Drivers

In June 2004 the City of Richmond was advised that VANOC would be requesting proposals from potential partners to deliver a Speed Skating Oval for the 2010 Olympics. The City as a part of its decision to respond to the RFP undertook extensive due diligence research. This research identified facility programming and operations, marketing, economic and community benefits for both the Olympic and Post-Games uses. It became clear there were significant benefits to being a host City for an Olympic venue and that an Oval was a financially viable facility.

The City developed its concept for the Oval by creating a community-based model that responded to Richmond's existing needs for sports, recreation and wellness, business and cultural amenities, the City's vision for its waterfront and City Centre development and the need for an Olympic legacy for high performance sports training and competition.

The Oval was also used as a catalyst for an overall development. The City of Richmond owned a 32 acre site along the Fraser River opposite Vancouver International Airport and the construction of the Oval was seen as a way forward for the City of Richmond to achieve the objectives of the Richmond Parks Recreation and Cultural Services plans to replace and upgrade aging civic facilities. The Oval was also seen as being a landmark and the central focus of the development of the site bringing together sports, culture and the environment. It was also to be the focal point for community recreation and wellness amenities and services while also being a major new centre for sports training and competition.

The drivers can be summarized as follows:

- accelerate delivery of the City's long-stated goals for upgrading and expanding its complement of sports facilities;
- become a focal point for community recreation and wellness amenities and services and a major new centre for sports training and competition;

- achieve objectives within the Parks, Recreation and Cultural Services Master Plan in a much shorter time frame than otherwise possible;
- provide a significant external funding source that allows the City to offset the cost of replacing or upgrading City recreational facilities and other community amenities;
- allow the City to advance capital work to replace or upgrade existing facilities nearing the end of their life cycle;
- provide economic spinoffs for the community beginning with the construction phase, through the Olympic Games and Post-Games uses;
- generate new tourism and economic gains for the City through increased tourist visits and spending and additional international exposure for Richmond;
- support the hospitality industry by helping to meet existing need for additional trade and exhibition space;
- provide access to ongoing Olympic legacy funding to help offset facility operating costs;
- extend the City Centre to the waterfront in support of Richmond's Official Community Plan;
- support development of a new City Centre Waterfront Park that will enhance public access and use of the Fraser River;
- provide a legacy for the 2010 Olympic and Paralympic Winter Games, the Province of BC and Government of Canada.
- Provide a premier facility and community for athletes to train, live, work and pursue education.

c) Funding Model

The cost of the Richmond Oval including the building and a waterfront plaza, park and Oval area parkade totalled \$178 million. Sources of funds were reported as follows:

Table 4.1 Funding Model	
Funding Source	Original Forecast
VANOC - Federal Contribution	\$30,000,000.
VANOC — Provincial contribution	\$30,000,000.
Casino Revenue (\$5 million year/10 years)	\$50,000,000.
Development Cost Charges (\$3 million year / 4 years)	\$12,000,000.
Sale / Lease of River Road Lands	\$43,000,000.
Parking Precinct (included in Land Sale)	\$6,500,000.
Additional Lands Assets	\$6,500,000.
Naming Rights, Sponsorship and Other (hotel tax if a trade and exhibition Centre is included in facility)	\$22 - \$32 million
TOTAL	\$200-\$210 million

In addition, this Olympic venue will be part of a Legacy trust that contributes to the operating expenses of the Oval in perpetuity. The Oval and two other Olympic venues are beneficiaries of the trust as these venues typically need support for long term operating costs that are higher than the possible revenue streams generated at these facilities.

Private funding was also used through the generation of revenue from the sale of adjoining real estate. The Oval occupied approximately 10 acres of a waterfront parcel and the remaining 17 acres was sold with two smaller parcels being leased on a 60 year term, to private developers through an RFP process that set out the City's vision for the lands and prescribed the manner and restrictions associated to the sale and lease of the parcels.

d) Factors in Determining Location

The location of the Oval on the banks of the Fraser River was chosen to provide a community legacy. The site while not immediately downtown became a means to extend the downtown to the waterfront through the construction of the multipurpose sports facility, adjacent park development and ultimate residential and commercial development that formed a part of the overall development as part of the Oval location.

4.5.3 City of Montreal: Saputo Stadium

a) Details

The stadium is a professional sized soccer stadium, 31,500 m² (110x70 metres) able to seat 12,531 people with the ability to expand to 18,000 seats. The facility is home to the Montreal Impact soccer team, their administrative headquarters, 20 corporate boxes, two indoor training fields and one outdoor practice field. It is intended that the stadium and associated fields will be used for regional, provincial, national and even international soccer events.

b) Drivers

The driving force behind the construction of this stadium is the owner of the Montreal Impact soccer team (Joey Saputo and the Saputo Family), and their desire to "give back to the community" through the construction of a complex that would serve as a legacy to soccer for future generations. The project was also driven by the lack of soccer fields in Montreal and a need for high level installations on the Island of Montreal.

The Saputo family wanted to find an innovative solution to accommodate the sport and ensure its development. It was felt that the best way to foster that development was in a high end environment that would be a *"gathering place for all soccer players and fans alike, as well as for future generations throughout the province"*.

c) Funding Model

Saputo Stadium construction was entirely financed through private funding. Construction costs were approximately \$15 million and the Saputo family contributed \$7.5 million with the remainder coming from other private funding sources. The Regie des Installations Olympiques (The Olympic Installations Board), the provincial government agency that runs Olympic Park, contributed the lands for the facility, 1.6 million square feet in Olympic Park, through a 40 year emphyteutic lease (a lease vehicle commonly used in Quebec government owned properties whereby the lessee must improve the property with construction). The terms of the lease are nominal and the land and control of the stadium reverts to the Olympic Park at the end of the lease.

d) Factors in Determining Location

The stadium is located in Olympic Park. The Olympics Installations Board approached the Saputo family to encourage them to locate the stadium in Olympic Park as opposed to the original intended location at the Technoparc, south of downtown Montreal. The Olympic Park location was seen as being the most advantageous because of its accessibility to public transit,

parking and the overall sports vocation of Olympic Park. It was seen as a benefit to both parties, the Olympic Park gained another sport venue, added visibility to the Olympic Park and complemented their current professional and community sport activities. The Saputo stadium gained a location at little cost that was easily accessible, highly visible and provided easily expandable options using neighbouring facilities, if required, in hosting events.

4.5.4 City of Toronto, BMO Field

a) Details

A 20,000 seat stadium facility completed in 2007, containing all typical stadium spaces including dressing rooms, media space, washrooms, private suites, concessions, maintenance, waste management etc. The facility also houses the offices for Toronto FC, BMO Field staff and the Canadian Soccer Association and has a large VIP reception room for corporate functions. The program calls for year round field use which is to be accommodated by an inflatable heated “bubble” that is put up in November and removed in March.

In the Summer of 2007, BMO Field was the main venue for the FIFA U-20 World Cup, in which it hosted over 260,000 people and 12 games. In its first year of operation, over 500,000 people entered BMO Field's gates. BMO Field is also used for community soccer purposes, corporate functions and concerts.

The construction of BMO Field was a part of the Board of Governors of Exhibition Place environmental initiatives.

b) Drivers

BMO Field is Canada's first soccer specific stadium. Located in Exhibition Place on the water front in the City of Toronto, it is an open air stadium with a capacity for 20,000 spectators. It is managed by Maple Leaf Sports and Entertainment Ltd. (MLSE) owners of the Toronto FC, the National Hockey League's Toronto Maple Leafs and the National Basketball Associations Toronto Raptors. The site is owned by the City of Toronto.

The construction of a stadium in Exhibition Place had been the subject of discussion in the City of Toronto since 2003. The partnerships involved in the discussion varied over time, but it was principally driven by MLSE in its bid to have a major league soccer team located in Toronto, however, the MLS required that expansion teams seeking franchises have plans for a soccer specific stadium. The impetus solidified in 2005 when FIFA and CSA committed to hold the FIFA Men's Under 20 World Youth Championship in the Toronto Stadium in 2007 followed by subsequent annual FIFA events. This commitment galvanized the ongoing discussions of various levels of government into an agreement between the City of Toronto, the Province of Ontario, the Federal Government, CSA and MLSE to fund the project at Exhibition Place.

According to the agreement, the City of Toronto would own the stadium and on an annual basis the City as of right would have access to use the stadium for community uses for a significant part of the annual available dates. In addition the stadium would be available for use by the City as an Olympic or World's Fair venue or as part of other international events the City may pursue.

The City of Toronto summarised the economic benefits of the Stadium as follows:

- Total construction impact (direct, indirect and induced) was estimated to be \$121M over the construction period of 18 months.

- Total operating direct spending impact was estimated at \$7M annually, increasing per annum by inflation.
- Direct and indirect employment impact during construction was estimated to be 750 jobs.
- Direct and indirect employment impact after construction was estimated to be 92 jobs.
- Annual tenant revenue and event revenue is estimated at approximately \$15.7M with an impact for visitor spending for one international soccer event to be in the order of \$22.7M.
- Overall Tax Revenue impacts for the Federal and Provincial governments during the construction period were estimated at \$11.8M.

c) Funding Model

BMO Field was funded through a three "P" funding model that involved all levels of government, the CSA and the private sector. The total cost to construct the stadium was \$62M (\$72M including the land). The Federal Government contributed \$27M, the Ontario Government \$8M, the City of Toronto contributed \$9.8M in cash toward the construction of the stadium and provided the land at Exhibition Place valued at \$10M and MLSE contributed \$8M towards the construction of the stadium and \$10M for securing the naming rights of the stadium.

The City of Toronto owns the stadium but it is managed by MLSE for 20 years. The City would pay MLSE \$200,000/year to operate the stadium. MLSE would be entitled to up to 40% of the parking fees generated by stadium use. The City and MLSE would equally share in any operating losses (after the first \$250,000 which would be covered by MLSE).

No property taxes are payable by the stadium.

A full account of the financial reasoning and terms and conditions are set out in the Minutes of the Council for the City of Toronto dated October 26,27,28 and 31, 2005 (Minutes of Toronto City Council) which are attached as **Appendix C**.

The principle terms and conditions were as follows:

- a) cash investment of \$62.8M with contributions of \$35.0M from Federal and Provincial governments; \$9.8M from the City and \$8M from MLSE and contribution of an additional \$10M from MLSE in anticipation of revenues to be received by MLSE for the sale of the naming rights, which it ultimately did to BMO.
- b) 20,000-seat stadium (capable of expansion to 30,000 seats and capable of conversion to a football format) with luxury viewing suites, premier seating, FIFA specifications including artificial field turf, food and beverage concessions and an air supported winter field structure;
- c) project (construction) agreement with MLSE to build the stadium on-time and on-budget with MLSE responsible for construction cost overruns;
- d) ownership of the constructed stadium remains with the City;
- e) management agreement for 20 years between City/Board and MLSE to manage the stadium on behalf of the City/Board;
- f) requirement for MLSE to purchase a major league soccer franchise to be located in Toronto;

- g) use agreement for 20 years between the City/Board and MLSE for the stadium to be the home of the MLSE major league soccer franchise subject to payment of rent;
- h) participation agreement for 20 years between the City/Board and CSA for the stadium to be the home for Canada's international soccer terms and be used annually to host international soccer events subject to payment of rent based on seven percent of gate receipts (less taxes);
- i) right of the City/Board to use the stadium for a significant part of any available dates annually on a cost recovery basis only for the City, CNE, World's Fair and Olympics (subject to use for regularly scheduled major league soccer games and FIFA games) and for other public events;
- j) right of the CNEA to use the stadium (subject to use for regularly scheduled major league soccer games and FIFA games) during the 18-day CNE period;
- k) right of the CNEA to receive 25% of gross revenues from stadium food and beverage concessions during the 18-day CNE period;
- l) City/Board retains the majority of incremental revenues from parking (except for the partial payment to the MLSE major league soccer franchise of 33.3% of gross parking revenues related to the 20 soccer games which increases to 40 percent in Year 2011) . MLSE presented a financial model to the City that forecasted events at the stadium would generate annual parking revenues of \$0.62M which are anticipated to increase over time;
- m) City/Board shares equally with MLSE any net revenues earned by the stadium;
- n) contribution of \$400,000 annually (increased by CPI annually from Year six onward) from the stadium revenues to a capital reserve account to be held by the City; and,
- o) The risk to the Board/City is if the MLSE projections are not achieved, then 50% of the operating deficits and any shortfalls in the capital funding must be funded by the Board/City. MLSE provided a no-time, non-revolving fund of \$250,000 to address operating shortfalls in the first instance. However, once the \$250,000 fund is depleted remaining operating shortfalls are to be funded equally by MLSE and the Board/City. The City/Board and MLSE share equally in funding any annual operating shortfalls or annual benefits of the stadium.

The report of the Finance Committee contained in the Minutes of Toronto City Council is provided as **Appendix C**.

d) Factors in Determining Location

Original plans called for the stadium to be constructed at York University. At that time the Canadian Soccer Association was attempting to partner with the Toronto Argonauts for the construction of a facility, however, when the Argo's signed a new lease at the Skydome the potential for a facility at York University came to an end.

The City of Toronto agreed to provide a portion of the funding if the park was built at Exhibition Place. This funding triggered the capital funding of \$35M from other levels of government and the \$18M from the MLSE, the owners of the Toronto Football Club Canada's first Major League Soccer team who were the drivers behind the desire to build a soccer specific stadium.

CNEA wanted the soccer stadium located at Exhibition Place for a number of reasons among them that the 20,000 seat stadium would allow the Exhibition Board either alone or in concert

with the City or tourism Toronto to bid on major events (such as world Youth Day that in 2002 was one of the main elements resulting in the extremely successful financial results shown by the Exhibition Board). Locating the Stadium at Exhibition Place also had the potential for increasing visitation during the period of the CNE if a major league soccer game or a FIFA/CSA game was played at that time, thereby increasing audience attendance at the grounds.

4.5.5 City of Mississauga- The Hershey Sport Zone

a) Details

The Hershey Sport Zone is a 200,000 square foot multi-sport facility that houses a full FIFA located adjacent to the existing Hershey Arena. It includes a regulation sized indoor soccer field, a full sized basketball court, a gymnastics facility and two outdoor soccer fields. Public and private usage is made of the facility including adult soccer leagues as well as City run recreational leagues. Trade and Home shows are held at the center as well as multicultural festivals.

The newly built Sports Zone, was part of a \$38M expansion of the Hershey Centre. The new facility is home to the Hershey Centre Sports Zone Indoor Soccer League, the 2,600 member Gymnastics Mississauga, and the Mississauga Minor Basketball Association. The Hershey Centre, named for Pennsylvania-based The Hershey Company, includes a state-of-the-art multi-purpose arena that is home to the Mississauga St. Michael's Majors of the Ontario Hockey League and several other clubs.

The arena has a capacity of 6,000 for hockey and other on ice skating shows and other events such as concerts. The Centre is widely used to host concerts, trade exhibits, boxing and wrestling and other mid size venue events.

The Hershey Center houses, four rinks, the Hershey Centre Main Bowl and 3 community rinks, an on site pro shop, fixed and mobile concessions, a rehabilitation centre, backstage services and dressing rooms, a press box, etc.

The Hershey Center currently hosts the following events:

- Junior A Hockey;
- Dodge Rodeo Championships;
- West 49 World Cup Skateboarding;
- Major Concerts;
- International Skating Events;
- Family Shows;
- Trade and Business Exhibitions; and
- Film & Photo Shoots.

The Sports Zone is seen as expanding the venue options of the centre.

b) Drivers

A Feasibility Study was undertaken to identify what type and level of sport facilities would be required in the future, with soccer identified as one of the most important. Additionally the local

gymnastics center needed to expand and the Sport Zone included it in its facility plan. The City of Mississauga's *Detailed Feasibility Study and Business Plan* is attached as **Appendix D**.

c) Funding Model

The facility expansion cost \$38M, and was 100% municipally funded.

d) Factors in Determining Location

The Hershey Sport Zone was located in the adjacent lands to the Hershey Centre adding to the overall sports facilities already located there and expanding the venue options of the overall facility. The Hershey Center already includes a state-of-the-art multi-purpose arena that is home to the Mississauga St. Michael's Majors of the Ontario Hockey League and is used for other skating shows and concerts.

The location was part of an overall concept for the area which is easily accessible to major highways (401 and 403), Pearson airport and has a large parking area for users and visitors.

4.5.6 City of Halifax Mainland Common Center

a) Details

The Region of Halifax decided many years ago to establish a regional location for a multi/sport and wellness group of facilities – the Mainland Common Centre. This facility combines uses including education, passive recreation, a library, walking, running and bike trails, soccer, baseball and is now expanding to include a comprehensive indoor sport facility. The facilities at Mainland common are designed to serve everyone in the community from active to passive, amateur to professional athlete.

The Mainland Common is a 160 acre site at the North end of Halifax that was purchased by the City of Halifax in 1985. The original Mainland Common Master Plan, approved by Halifax City Council in 1992, imagined the Mainland Common as a central location for sport, recreational, cultural, and nature appreciation activities for the growing neighbourhoods around it, the City and the broader region.

An extensive public consultation was undertaken that culminated in agreement that the site would balance active and passive uses and conserve as much of the natural environment as possible. In addition the Common would be accessible to people of all ages, ability and income. One of the first facilities constructed on the common was a library (the Keshen Goodman Library) along with a school (the Halifax West High School) and an indoor/outdoor soccer facility.

The latest addition to the Centre, sparked by an award of the 2011 Canada Winter Games, is a 176,000 square foot field house that will blend community wellness and recreational training with high performance sports training and competition. This facility will include:

- an eight-lane 25-meter indoor pool
- separate leisure and therapeutic pools
- an 11,000 sq ft fitness centre;
- a 52,000 sq ft fieldhouse with four full sized gymnasium courts and the capacity to house:
 - Basketball - 4 NBA sized courts

- Badminton - 12 courts - Canada Games venue
 - Artistic Gymnastics - Canada Games venue
 - Volleyball - 5 courts
 - combative sport mats
 - Table Tennis - 20 courts
 - bleachers for 500 persons plus additional loose seating for specific events
 - storage areas for equipment
 - meeting/classroom space
- a 200-meter six-lane track
 - community and activity spaces
 - youth centre
 - child minding space
 - arts and crafts studio
 - kitchen, café
 - dedicated space for Canadian Sport Centre Atlantic including sport science testing and sport medicine
 - leased space (physio therapy)

The Report to the City of Halifax Council is attached as **Appendix E**.

b) Drivers

The main drive of the new expansion is the award of the 2011 Canada Winter Games.

When completed, the Mainland Common Centre will have services and facilities all under one roof, creating an integrated training environment that will result in the development of a true high performance centre. Athletes can choose to remain in the Halifax area to pursue high level training and the community gains from access and exposure to both elite training and community facilities.

The facility will be designed and programmed to ensure access by all citizens. Community wellness programming will blend with high performance sports training and competition to ensure that the benefits of physical activity and athletic participation are extended to the entire community. The facility will also be available for a variety of secondary uses including special cultural and community events.

c) Funding Model

The Total construction cost of the expansion is \$40.6M. The breakdown of Funding is as follows:

Table 4.2 Funding Model		
HRM	\$13,373,682	33.0%
Community	\$ 2,000,000	4.9%
Provincial	\$12,783,500	31.5%
Federal	\$12,416,500	30.6%
Total	\$40,573,682	100.0%

The future management of the facility is under review. This review has led to a recommendation that an arm's length, non-profit society, reporting body relationship with HRM be established to govern and manage the facility similar to other existing HRM district facilities.

4.5.7 City of Winnipeg-MTS Centre

a) Details

A new 15,000 seat entertainment, sports and performing arts facility that opened in downtown Winnipeg in the Fall of 2004. The facility is 440,000 square feet in size, with an ice surface that can convert from the standard North American professional hockey dimensions of 85 ft X 200 ft to international hockey dimensions of 100 ft X 200 ft. The Centre was also designed to allow for 30,000 square feet of Exhibition space by the easy removal of the rink boards and the first 6 rows of seating. The MTS Centre is home to the Manitoba Moose hockey team and has hosted a wide variety of concerts, circus performances, the Cirque du Soleil, figure skating shows, the Tim Horton's Brier, Monster Jam, the Harlem Globe Trotters etc. Since it opened on November 16, 2004 nearly four million fans have attended the centre.

The design also incorporates a private suite level, rental party suites, an extensive club seat package, quality food outlets, and a Moxie's restaurant. It also features three wide concourses, a Moose sports retail store, ample washrooms and redevelopment of the old Eaton's Powerhouse into the sports pub Tavern United as well as several floors of new office space.

The design principles for the arena were to ensure that the facility could provide excellent sight lines from every seat, superb acoustics for concerts and the best ambience and amenities for sports of all kinds - hockey, basketball, curling, arena football, lacrosse, indoor soccer - including international and championship events like World Junior Hockey and the Brier. The Centre can accommodate up to 17,000 concert-goers, but can just as easily be curtained down to create an intimate concert entertainment setting for audiences as small as 2,500.

Part of the program for the MTS Centre included a Community Use & Access Program (CUAP) to ensure the MTS Centre is available for use by community groups for community events on an annual basis. A Community Use and Access Committee was established to ensure that the community would benefit in a fair, consistent and transparent manner. Community Groups organized for recreational, cultural, sport, fund-raising and other community-driven activities are the targets of this program.

b) Drivers

Essentially this was a private sector driven initiative by True North Entertainment Limited, the owners of the Manitoba Moose. In looking for a location to construct a new arena for the Manitoba Moose they partnered with the then owner of the old Eaton's store site located in downtown Winnipeg, who had, notwithstanding considerable effort, been unable to establish a viable use for the old building. The sheer size of the building, its complete lack of structural integrity and the resulting cost of bringing it to code for any purpose made demolition an inevitability. The building had been empty and useless for several years prior to the initiation of the MTS Centre project. In that context, government leaders embraced the idea of the private investors for a major entertainment centre in the heart of downtown Winnipeg.

c) Funding Model

The MTS Centre cost \$133.5 million, including land acquisition, construction and furniture and fixtures. The MTS Centre Project Group, through True North Entertainment Limited would own and operate the new entertainment centre and the Manitoba Moose.

Three levels of government contributed to the capital costs of the project. The City of Winnipeg contributed \$14,500,000 in cash and infrastructure services, the Province of Manitoba \$14,000,000, and the Government of Canada \$12,000,000. Those monies, totalling \$40,500,000 were contributed through the infrastructure program operated by the three levels of government.

The balance of the capital costs of \$93,000,000 (approximately 70 per cent were funded by private investors, The MTS Centre Project group, by payments of cash and the transfer of property to the project.

Against this project cost and the associated payment of cash and transfer of all property, a mortgage in the amount of \$63,000,000 was secured. The mortgage debt and all its consequent costs and risks are entirely the responsibility of the private sector investors.

The public sector contribution was fixed. The three levels of government incurred no risk or obligation for cost overruns on the project, or operating deficits either during construction or once the MTS Centre was open and operating. All of those risks were assumed and borne in their entirety by the private investors.

Returns to the governments from taxes earned in the construction phase actually off-set a large percentage of the public supports to the project. The Manitoba Bureau of Statistic's assessment states that 80 per cent of the province's initial contribution was paid back before the doors to the MTS Centre actually opened and the federal government has been paid back through its taxation of various aspects of the development and ongoing operations.

d) Factors in Determining Location

The City of Winnipeg in its planning vision for 2020 had determined that the downtown of Winnipeg was its heart.

...it must be healthy if the City as a whole is to be fit and strong. Its health is a measure of its economic vitality, its social vibrancy and its physical attractiveness. In the end, the streets and buildings, the people, the businesses, the activities, merge to fashion the image that Winnipegger's hold of their city. It is also the image visitors take home with them. As a result, our reputation as a city rests with our downtown.

Downtown was already home to well-established major arts, cultural and sports venues, and the city felt it was the logical and preferred place for a new sports and entertainment centre, a fact confirmed by several feasibility studies they had conducted over the past 20 years.

The site itself was the home of the former Eaton's store which had been empty for some time. The sheer size of the building, its complete lack of structural integrity and the resulting cost of bringing it to code for any purpose made demolition an inevitability. The True North Sports and Entertainment Limited partnered with the then owner of the site for the construction of the new MTS Center. That decision sparked a rather nasty controversy from those who wanted to preserve the historic building, however, government leaders embraced the idea of the private

investors for a major entertainment centre in the heart of downtown Winnipeg. Those leaders understood that the Centre could be one of several important initiatives, both large and small, which could substantially contribute to a re-birth of the centre of the city.

The design of the building encompassed four separate pedestrian bridges connecting the Centre to the downtown walkway system creating a hub that links the facility with major downtown shopping centres, indoor parking, several hotels and major office towers. The site is also connected to all parts of the city by major transportation arteries and more than 40 transit routes. Parking exists nearby with over 7,000 spaces available within a five-minute walk, including 2,700 that are indoors and heated.

4.6 United States Experience

U.S. experience is a useful tool for exploring the forces and factors that drove the decisions of location and construction of multi sport and entertainment facilities. Financial models are useful only in a general sense particularly in how they may have reduced public risk, however, the specifics of the manner and sources of funding differ from most Canadian experiences.⁹

The results in the US appear to mirror the recent construction of multi-sport entertainment facilities here in Canada (or vice versa), with new facilities relying largely on private funding and/or public private partnership models that help deflect (or transfer) risk from public bodies.

Moreover, new facilities are typically constructed as part of larger overall comprehensive development plans by cities/states to help redevelop or create focal points for an area or city, or to become part of a larger sport and entertainment venue where a mix of sport, recreation, cultural and community uses are found. The “old” model of a single stand alone facility is rarely used.

4.6.1 City of Los Angeles, The Staples Center

a) Details

Located on 10 acres in downtown Los Angeles, the Staples Center provides nearly 1 million square feet and seats anywhere from 12,900 to 20,000 people depending on the event. The Staples Center is one of the most successful and profitable sports and entertainment facilities in North America. It is the only arena in North America that is home to five professional sports franchises: the Los Angeles Lakers and Los Angeles Clippers of the NBA, the Los Angeles Kings of the NHL, the Los Angeles Sparks of the WNBA, and the Los Angeles Avengers of the AFL. The arena hosts 250 events and draws nearly 4,000,000 visitors annually.

Apart from sports, the Staples Center has hosted major national/international special events such as the 2000 Democratic National Convention, the 2002 U.S. Figure Skating

⁹ The City of Edmonton in its current considerations and investigations surrounding the decision to proceed with the construction of a new arena in the downtown area draw heavily from a 2008 report prepared by Dr. Mark Rosentraub, entitled “Sports Facilities, A New Arena in Edmonton, The Opportunities for Development and a City’s Image: Lessons from Successful Experiences”, explores the recent construction of new sport facilities in Indianapolis, Columbus, Ohio, Los Angeles and San Diego. This report has an in depth review of the financial models used, the success of public private partnerships, and the use of the facilities as catalysts for an integrated development of an area of a city. How their construction becomes a part of a larger planning opportunity. The report is attached as **Appendix F**.

Championships, the 52nd NHL All-Star game, the 2004 NBA All-Star Game, the Pac-10 Basketball Finals since 2002, the WTA Tour Championships from 2002 to 2005, the Grammy Awards, the Summer X Games indoor competitions, the UFC 60 pay per view event, as well as numerous Concerts, WWE and Championship Boxing matches.

Importantly, the Staples Center has become the anchor of the downtown Los Angeles "entertainment campus" called L.A. Live, which also includes the 7,100-seat Nokia Theatre; a 54-story, 1,001-room convention hotel and condominium project, a 2,200-seat live music venue; the 40,000-square-foot open-air Nokia Plaza for broadcast events, large celebrations and outdoor concerts; and a 14-screen movie theatre complex, among other restaurants and shops.

b) Drivers

The City of Los Angeles while a certainly a landmark city internationally and with a strong economy, was experiencing a deterioration of its downtown core in the late 1980s and early 1990s. A redevelopment plan was created that included the building of a new arena for the Los Angeles Lakers and the Los Angeles Kings, a new concert hall for the Los Angeles Philharmonic Orchestra, a new convention center and new residential and commercial development.

The real impact, however, has been the arena's contribution to the downtown core of Los Angeles image through the venue itself, the architectural projects that occurred as part of the redevelopment plan and the creation of a renewed commercial and residential neighbourhood in an area that were previously regarded as deteriorated and unsafe.

c) Funding Model

A public private funding model was used to finance the arena project. The \$375M arena project was built through the commitment of \$71.1M in public funding. Additionally, the private developer agreed to fund \$58.5M of the public investment through a fee collection on various income streams generated at the venue. Those user fees reduced the income or profits to the owner and if additional revenues were generated from the streams dedicated to the public sector those funds would also be retained by the public sector which could ultimately offset the entire public investment. Staples Inc. paid \$100,000,000 for the naming rights over a 20 year period.

d) Factors in Determining Location

The revitalization of the downtown core was the principal reason for its location. The facility has become the central point of an overall development of the downtown core that is continuing now with entertainment, commercial and residential development valued in excess of \$3B.

4.6.2 City of San Diego, PetCo Field

a) Details

This open air baseball stadium opened in 2004 and has 42,445 fixed seats in a stadium that encompasses 18 acres of land in the heart of downtown San Diego. The design of the stadium is such that it "pulled" the restaurants, administrative offices and other amenities away from the seating bowl itself into other buildings. As a result, the ballpark's concourses are open not only to the playing field but also to the surrounding city.

PetCo was also designed to include a "Park at the Park." This 2.7-acre area lies beyond the outfield, and it includes a kid-size ball diamond and "Picnic Hill," which is a raised area beyond right-center field from where the field is visible.

The stadium not only hosts Major League Baseball it is also a venue for other sporting events, concerts and corporate events.

b) Drivers

San Diego was experiencing growth pattern issues similar to other US cities with growth concentrated away from the downtown core, creating sprawling patterns of development and increased commuting times.

The San Diego major league baseball team (Padres) played their home games in a stadium shared with the National Football League team (Chargers). This older facility had been designed to accommodate both sports, however, seating patterns for each sport are very different thus spectators of both sports were often left with unsatisfactory views and game experiences.

The owner of the Padres wanted to construct a new baseball specific stadium.

c) Funding Model

The new stadium was built for \$411 million with the City of San Diego responsible for \$169M and the Center for City Redevelopment Corporation - a public corporation, responsible for an additional \$132M.

The Padres owner guaranteed real estate development around the facility that would generate sufficient new tax money to retire the bonds supporting the public sectors investment. The owners guarantee involved a letter of credit that could be called upon by the City if the real estate was not built, effectively making the Padre's owner liable for the payments required to service the debt on the public investment.

By 2006 the Padre's through their real estate company had invested \$2.02B and other investors had spent \$1.46B. A public investment of \$300 million has therefore produced almost \$3.5B in private sector spending (along with the associated taxes, jobs and other economic benefits).

d) Factors in Determining Location

Downtown was the location the City demanded by the City of San Diego to engender development of its core and because the public transportation infrastructure was already there to support the stadium and new development. As planned, PetCo Park is now part of a downtown ballpark district that is surrounded by high density hotels, condominiums, office buildings, parking, shops and restaurants. The ballpark is located across from the San Diego Convention Center and borders the popular Gaslamp Quarter. It has become the heart of downtown San Diego and has successfully revitalized the previously run down East Village district.

4.6.3 Columbus Ohio, The Nationwide Arena

a) Details

The Nationwide Arena opened in September 2000. It is the home of the National Hockey League's Columbus Blue Jackets, as well as the Arena Football League's Columbus

Destroyers, the United States Hockey League's Ohio Junior Blue Jackets and also hosts a wide variety of entertainment events.

The overall facility is 800,000 square feet in area and includes a practice rink, office and retail spaces. Seating capacity is 18,500 seats for NHL hockey and up to 20,000 for concerts. Nationwide Arena is the only building in the National Hockey League that also houses the team's practice facility (Dispatch Ice Haus), and which is attached to the arena.

b) Drivers

Columbus is the Ohio state capital with an associated large numbers of public sector workers. Over time, the population has decentralized creating many attractive suburbs but leaving the downtown with limited identity and life after hours as large numbers of public sector workers vacated the downtown area at the end of the work day.

In addition, the Ohio State University (OSU) campus is located just north of the downtown and is quite vibrant. However, the area around the university had not developed in a way that maximizes the benefits presented by the 50,000 students and associated medical facility.

The City was unable to build a large base of employers, and the number of residents in downtown decreased significantly between 1960 and the 1990s. The new arena became a catalyst for the redevelopment of downtown Columbus.

c) Funding Model

Columbus based Nationwide Insurance agreed to pay 90% of the cost of building the new arena with the local newspaper ownership agreeing to finance the balance. The City of Columbus agreed to pay for needed infrastructure improvements and environmental remediation of the area as well as providing the land under a long term lease arrangement.

Nationwide was also designated the master developer of an area adjacent to the arena. The city agreed to grant Nationwide Arena a 15-year, 90 percent property tax abatement in the designated arena district, however, it had to hold the local public schools in the district harmless by ensuring the schools received the same revenue had the arena district paid property taxes. This was achieved though a ticket tax on events at the arena additionally the schools received money from city income tax revenue generated from the arena. The county's convention authority invested \$11.7 million in buying land for the arena. It was to get \$150,000 a year back during the arena's first 10 years, \$165,000 a year back from year 11 to year 25, then \$165,000 plus an inflation adjustment through the arena's 50th year. The payments will be made from the \$3 million a year the NHL Bluejackets will pay annually in lease payments. After 10 years, the team's lease grows to \$3.3 million and any agreed-upon increases. At the end of 50 years, the convention authority owns the arena unless Nationwide exercises an option to buy it.

d) Factors in Determining Location

The Nationwide arena was located downtown as part of a new entertainment district created by the city. Ultimately the area extended North to the Ohio State University creating three districts that ran together, the Arena District, Short North and ultimately an area known as south Campus Gateway adjacent to the campus of OSU. The areas were a mix of restaurants, retail shops a new multiplex theatre, residential units including residential units occupied by OSU students.

4.6.4 Indianapolis

a) Details

This example is slightly different than the foregoing cities in that it was no one sport facility that was constructed but rather a decision by the City to revitalize its downtown core through the construction of a number of sport and entertainment facilities in a close district. The sport/entertainment facilities constructed in this area were:

- Market Square Arena
- Sports center
- IU Track and Field Stadium
- IU Natatorium
- Velodrome
- Hoosier/RCA Dome
- St'I Institute of sports
- Conesco Fieldhouse
- Victory field
- RCA Dome Improvements
- NCAA Headquarters
- Pan American Plaza

b) Drivers

The downtown core of the City of Indianapolis was deteriorating and the population within the core was declining. Consolidation failed to invigorate the core as suburban areas were growing and cultural and retail development was moving outwards with it. Indianapolis also suffered from a lack of image and centrality to the region. Business leaders left in the core were worried their assets would decline if the core area continued to deteriorate and community leaders feared the remaining businesses would leave the region or move to the suburbs. Therefore beginning in the 1970s and continuing through 2009 the City formed a series of public private partnerships to use sports to turn a deteriorating downtown area into a commercial, residential and hospitality center which when combined transformed Indianapolis' identity.

c) Funding Model

A mix of public private partnerships, purely public and purely private funding was used to redevelop the downtown core projects. A total of \$4.4B was spent between 1974 and 1999, of which only about 13% was paid directly by the City. The total expenditure included sport, cultural, commercial, retail, residential and hotel facilities as well some State.

d) Factors in Determining Location

The goal of the development plans were to rejuvenate the downtown core of Indianapolis, therefore all development was focused within a small (2 mile radius) of the downtown. The aim was to create a tourist/sports district that was easily accessible by pedestrians, where both tourists and residents could mingle together enjoying the activities hosted at the various venues and visiting the retail operations located at and around the venues.

5.0 Site Identifications and Rankings

As a final stage of the mandate, the CRG Team identified and evaluated possible sites in Ottawa for the location of a multi-purpose sports and entertainment facility. The Approach and Methodology to conduct this phase of the work comprised the following elements:

- Translating the results of previous research into land requirements for a possible new Multi-Purpose Sports and Entertainment Facility;
- Working with City Staff, identifying locational criteria (must haves, nice to have, etc.) associated with new Multi-Purpose Sports and Entertainment Facilities. These were grouped into four areas, each with sub-categories:
 - Site Technical;
 - Site General;
 - Transportation and Access; and
 - Planning and Infrastructure;
- Criteria Weighting was also established, reflecting the fact certain criteria are more/less important than others. The complete list of Site Evaluation Criteria is presented in Table 5.1, below.

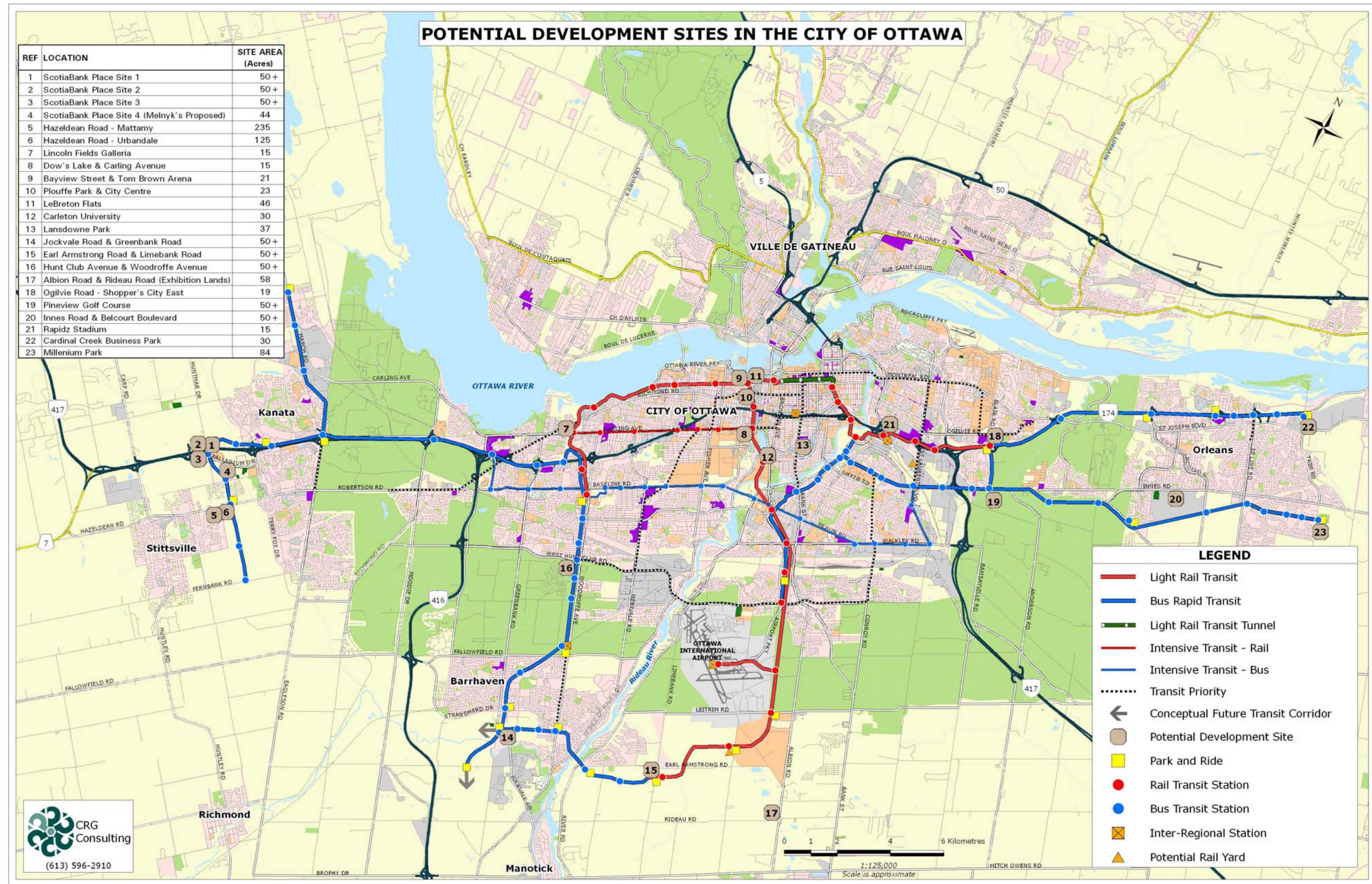
Table 5.1 Site Evaluation Criteria		
#	Criteria	Remarks
A) Site Technical		
1	Site Area	minimum site size requirements
2	Site Configuration/Topography	"regular" dimensions superior to irregular
3	Site Ownership	City owned sites score higher
4	Ground/Soil Conditions/Contaminants	"clean" sites score higher
5	Location (Inner vs. Suburbs)	central sites score higher
6	Acquisition, Anticipated Cost of	lower acquisition costs score higher
7	Site & Facility Development Costs	lower site development costs score higher
B) Site General		
1	Impact to Neighbours	minimal impact scores higher
2	Access to hotels, restaurants, other amenities	access to amenities (within walking distance) score higher
C) Transportation & Access		
1	Proximity/Access to Major Roadways	direct and current proximity/access scores highest
2	Proximity/Access to Public Transit	direct and current proximity/access scores highest
3	Proximity/Access to Parking	Is sufficient parking available (on-site or within walking distance)?
D) Planning & Infrastructure		
1	OP Status	compatible with land use designation in OP score highest
2	Infrastructure	serviced/serviceable sites score highest
3	Development & Redevelopment Enablers	sites with potential for additional complimentary development/redevelopment score highest

- Based on the identified/agreed-upon site selection criteria, the CRG Team and City Staff collectively identified possible sites. A total of 23 possible sites were identified within the City of Ottawa. This included sites in all areas of the City (suburbs west, south and east),

as well as within and near the urban core. Sites are referenced on the accompanying map (Figure 5.1). A detailed profile was also prepared for each site (profiles are appended – **Appendix H**).

- Each identified site was then scored/rated in terms of whether or to what extent they meet the identified criteria and requirements. Complete results are presented in Table 5.2. The maximum possible site score is 95.00 “points” and as shown many/most sites scored within a narrow range (most achieved between 65 and 70 points, out of the possible 95 points). Two sites achieved the highest ranking/score of 77.50 points, a City owned site along Bayview Road and including the Tom Brown Arena, and a property located at Carleton University. Comparatively, the City owned Lansdowne Park site scored 72.00 (ranking it 6th out of 23 possible sites) and the City owned site in Kanata proposed (by E. Melnyk) for the development of a multi-purpose soccer stadium scored 70.75 (ranking it 7th out of 23 possible sites).

Figure 5.1 – Site Map



**Table 5.2
Location Criteria**

City of Ottawa - Major Sports and Entertainment Needs Assessment
Location Assessment

#	Criteria	Remarks	Criteria Weighting*	Index 1		Index 2		Index 3		Index 4		Index 5		Index 6		Index 7		Index 8		Index 9		Index 10		Index 11		Index 12	
				Scotiabank Place 1		Scotiabank Place 2		Scotiabank Place 3		Scotiabank Place 4 (Melnyk's proposed site)		Hazeldean Road - Mattamy		Hazeldean Road - Urbandale		Lincoln Fields Galleria		Carling Avenue & Preston Street		Bayview Street/Tom Brown Arena		Plouffe Park/City Centre		LeBreton Flats		Carleton University	
				Location Score**	Location Remarks	Location Score**	Location Remarks	Location Score**	Location Remarks	Location Score**	Location Remarks	Location Score**	Location Remarks	Location Score**	Location Remarks	Location Score**	Location Remarks	Location Score**	Location Remarks	Location Score**	Location Remarks	Location Score**	Location Remarks	Location Score**	Location Remarks	Location Score**	Location Remarks
A) Site Technical																											
1	Site Area	minimum site size requirements	1.50	5		5		5		5		5		5		2		5		5		5		5		5	
2	Site Configuration/Topography	"regular" dimensions superior to irregular	0.75	5		5		5		5		5		5		3		3		3		3		3		3	
3	Site Ownership	City owned sites score higher	1.00	3		3		3		3		3		3		3		2		5		3		2		3	
4	Ground/Soil Conditions/Contaminants	"clean" sites score higher	1.00	5		5		5		3		5		5		3		3		1		3		1		1	
5	Location (Inner vs Suburbs)	central sites score higher	1.00	1		1		1		1		1		1		3		5		5		5		5		5	
6	Acquisition, Anticipated Cost of	lower acquisition costs score higher	0.75	4		4		4		4		4		4		3		3		3		3		3		3	
7	Site & Facility Development Costs	lower site development costs score higher	1.50	4		4		4		4		4		4		3		4		3		2		4		4	
Sub-Total Site Technical Scores:				29.25		29.25		29.25		29.25		29.25		29.25		21.00		28.00		27.50		25.00		26.00		28.50	
B) Site General																											
1	Impact to Neighbours	minimal impact scores higher	1.50	4		4		4		4		4		4		3		3		4		3		4		5	
2	Access to hotels, restaurants, other amenities	access to amenities (within walking distance) score higher	1.50	1		1		1		1		0		0		2		5		4		4		4		4	
Sub-Total Site General Scores:				7.50		7.50		7.50		7.50		6.00		6.00		7.50		12.00		12.00		10.50		12.00		13.50	
C) Transportation & Access																											
1	Proximity/Access to Major Roadways	direct and current proximity/access scores highest	1.50	5		5		5		5		4		4		4		4		3		3		3		3	
2	Proximity/Access to Public Transit	direct and current proximity/access scores highest	2.00	4		4		4		4		4		4		5		5		5		5		5		5	
3	Proximity/Access to Parking	Is sufficient parking available (on-site or within walking distance)?	1.50	3		3		4		4		3		3		2		4		4		4		4		4	
Sub-Total Transportation & Access Scores:				20.00		20.00		21.50		21.50		18.50		18.50		19.00		22.00		20.50		20.50		20.50		20.50	
D) Planning & Infrastructure																											
1	OP Status	compatible with land use designation in OP score highest	1.00	5		5		5		5		5		1		5		1		5		5		5		5	
2	Infrastructure	serviced/serviceable sites score highest	1.00	3		3		3		3		3		3		4		4		5		4		4		4	
3	Development & Redevelopment Enablers	sites with potential for additional complimentary development/redevelopment score hi	1.50	3		3		3		3		3		3		4		4		5		5		4		4	
Sub-Total Planning & Infrastructure Scores:				12.50		12.50		12.50		12.50		12.50		8.50		15.00		11.00		17.50		16.50		15.00		15.00	
Total Scores:				69.25		69.25		70.75		70.75		66.25		62.25		62.50		73.00		77.50		72.50		73.50		77.50	
Ranking (1-23):				10		10		7		7		16		22		21		4		1		5		3		1	

* Reflects relative importance of criteria.
** From 1 to 5, 5 (Fully Meets/Exceeds Criteria), 0 (Does Not at all Meet Criteria).

City of Ottawa - Major Sports and Entertainment Needs Assessment
Location Assessment

#	Criteria	Remarks	Criteria Weighting*	Index 13		Index 14		Index 15		Index 16		Index 17		Index 18		Index 19		Index 20		Index 21		Index 22		Index 23	
				Lansdowne Park		Jockvale Road & Greenbank Road		Earl Armstrong Road & Limebank Road		Hunt Club Avenue & Woodroffe Avenue		Albion Road & Rideau Road (Exhibition Lands)		Ogilvie Road - Shopper's City East		Pineview Golf Course		Innes Road & Belcourt Boulevard		Rapidz Stadium Site		Cardinal Creek Buz Pk		Millenium Pk	
				Location Score**	Location Remarks	Location Score**	Location Remarks	Location Score**	Location Remarks	Location Score**	Location Remarks	Location Score**	Location Remarks	Location Score**	Location Remarks	Location Score**	Location Remarks	Location Score**	Location Remarks	Location Score**	Location Remarks	Location Score**	Location Remarks	Location Score**	Location Remarks
A) Site Technical																									
1	Site Area	minimum site size requirements	1.50	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	2	5	5	5		
2	Site Configuration/Topography	"regular" dimensions superior to irregular	0.75	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	3	5	5	5			
3	Site Ownership	City owned sites score higher	1.00	5	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	5	3	3	3		
4	Ground/Soil Conditions/Contaminants	"clean" sites score higher	1.00	1	5	3	3	3	3	1	3	3	3	3	3	5	3	3	3	3	3	3	3		
5	Location (Inner vs Suburbs)	central sites score higher	1.00	5	2	2	2	2	5	2	3	3	3	3	1	4	4	4	4	2	2	2	2		
6	Acquisition, Anticipated Cost of	lower acquisition costs score higher	0.75	5	4	4	4	4	3	5	3	3	3	5	2	5	5	5	5	5	5	5	5		
7	Site & Facility Development Costs	lower site development costs score higher	1.50	5	4	4	4	4	4	4	2	3	3	4	4	3	4	3	4	4	4	4	4		
Sub-Total Site Technical Scores:				33.50	30.25	28.25	30.50	29.00	25.50	30.50	27.75	25.50	29.00	29.00											
B) Site General																									
1	Impact to Neighbours	minimal impact scores higher	1.50	3	4	4	4	5	5	3	3	4	3	4	3	4	3	4	4	4	4	4	4		
2	Access to hotels, restaurants, other amenities	access to amenities (within walking distance) score higher	1.50	5	2	0	0	1	0	3	2	1	2	1	2	1	2	1	1	1	1	1	1		
Sub-Total Site General Scores:				12.00	9.00	6.00	9.00	7.50	9.00	7.50	7.50	7.50	7.50	7.50	7.50	7.50	7.50	7.50	7.50	7.50	7.50	7.50	7.50	7.50	
C) Transportation & Access																									
1	Proximity/Access to Major Roadways	direct and current proximity/access scores highest	1.50	3	4	4	4	4	4	4	5	5	5	5	4	5	4	5	4	4	4	4	4		
2	Proximity/Access to Public Transit	direct and current proximity/access scores highest	2.00	2	4	5	5	4	0	5	4	2	4	2	4	4	4	4	4	4	4	4	4		
3	Proximity/Access to Parking	Is sufficient parking available (on-site or within walking distance)?	1.50	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3		
Sub-Total Transportation & Access Scores:				13.00	18.50	20.50	18.50	10.50	22.00	20.00	14.50	20.00	18.50	18.50	18.50										
D) Planning & Infrastructure																									
1	OP Status	compatible with land use designation in OP score highest	1.00	5	5	5	5	2	2	5	2	5	2	5	5	5	5	5	3	2	2	2	2		
2	Infrastructure	serviced/serviceable sites score highest	1.00	4	3	3	3	4	2	4	4	4	4	4	4	4	4	4	2	2	2	2	2		
3	Development & Redevelopment Enablers	sites with potential for additional complimentary development/redevelopment score hi	1.50	3	3	3	3	1	1	2	2	3	3	3	3	3	3	3	3	3	3	3	3		
Sub-Total Planning & Infrastructure Scores:				13.50	12.50	12.50	7.50	5.50	12.00	9.00	13.50	13.50	9.50	8.50											
Total Scores:				72.00	70.25	67.25	65.50	52.50	68.50	67.00	63.25	66.50	64.50	63.50											
Ranking (1-23):				6	9	13	17	23	12	14	20	15	18	19											

* Reflects relative importance of criteria.

** From 1 to 5, 5 (Fully Meets/Exceeds Criteria), 0 (Does Not at all Meet Criteria).

Appendix A – Inventory Of Facilities

Appendix B - Edmonton Report

Appendix C - Minutes Of Toronto City Council

Appendix D - Mississauga's Detailed Feasibility Study and Business Plan

Appendix E - Report to the City of Halifax Council

Appendix F - Opportunities for Development and a City's Image

Appendix G – Summary of Major League Soccer Stadiums

(Prepared By The City Of Ottawa, Economic Development Division, October 2008)

Appendix H – Site Profiles