



Feasibility Study for a

# MAJOR SPORT AND EVENT CENTRE

in the City of Peterborough

PUBLIC OPEN HOUSE #1 | April 3rd, 2018

# KEY MILESTONES – PHASE 1

## PROJECT PURPOSE + TIMELINES

### PHASE 1: MARKET ASSESSMENT, BENEFITS AND CONSULTATION

- a) Stakeholder Consultation
- b) Situational Assessment
- c) Identifying Future Opportunities
- d) Interim Presentation
- e) Facility Concept & Capital Cost Estimate
- f) Site Location Overview and Choices
- g) Future Use of PMC and Public Input
- h) Economic and Social Impact Benefit Analysis
- i) Reporting



# KEY MILESTONES – PHASE 2

## PROJECT PURPOSE + TIMELINES

### PHASE 2: BUSINESS CASE, DESIGN AND IMPLEMENTATION

- a) Refine Concept and Design
- b) Location Criteria
- c) Programming
- d) Capital Budget and Programming
- e) Interim Report and Review
- f) Operations Business Plan and Proforma
- g) Facility Delivery Options Assessment
- h) Reporting, Review and Presentation



# STUDY TEAM: WHO WE ARE

The graphic for 'Feasibility Experts' consists of a grey trapezoidal shape on the left and a blue trapezoidal shape on the right. The text 'Feasibility Experts' is written in white, bold, sans-serif font on the blue background.

**Feasibility Experts**

The graphic for 'Architectural Advisory' consists of a grey trapezoidal shape on the left and a blue trapezoidal shape on the right. The text 'Architectural Advisory' is written in white, bold, sans-serif font on the blue background.

**Architectural Advisory**

The graphic for 'Implementation' consists of a grey trapezoidal shape on the left and a blue trapezoidal shape on the right. The text 'Implementation' is written in white, bold, sans-serif font on the blue background.

**Implementation**



# STUDY PURPOSE

**NOTE:** This exercise is different from the Needs Assessment for a Twin-pad Arena & Aquatics Complex

To determine the viability of investment in a new Multi-Use Sport and Event Centre (MUSEC) in the city from a number of perspectives:

- Relative need for a new facility;
- Market opportunity;
- Design and capital costs;
- Estimated operational performance; and
- Options for locations.



# WHY ARE WE STUDYING A REPLACEMENT FOR THE PMC?



1

Buildings have a life span

2

The PMC has a role in the civic life of Peterborough

3

The PMC is also in competition with other venues in other cities

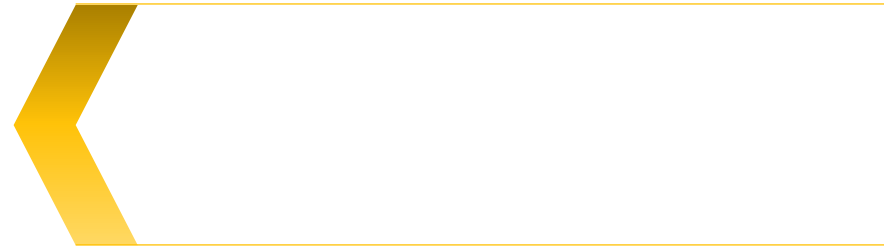
4

The future needs to be secured



- 1** A clear indication of market potential for a new facility
- 2** A Business Plan for a new MUSEC
- 3** A general concept and functional space program (to scale)
- 4** An analysis of potential sites
- 5** Capital costs & economic impact
- 6** Reuse considerations for the PMC

## WHAT ARE THE OUTPUTS IN JUNE/JULY





# WHAT DEFINES A FEASIBILITY STUDY

- There is no single measure of viability of a facility of this nature.
- This must be determined through a combination of work streams that together address the relative merits of the project:
  - Proposed capital costs and operational impacts (both financial and “below-the-line” economic benefits);
  - The tolerance toward the range of risks (cost, market, timing, and financial) etc.;
  - Research, best-practice and community consultation.

# DEFINING A FEASIBILITY STUDY

What is the future of the PMC as a Multi-Use Sport and Event Centre?

Is the City invested in the spectator sports and events market?

What is the future market potential?

What kind of new building is required? How does it function?

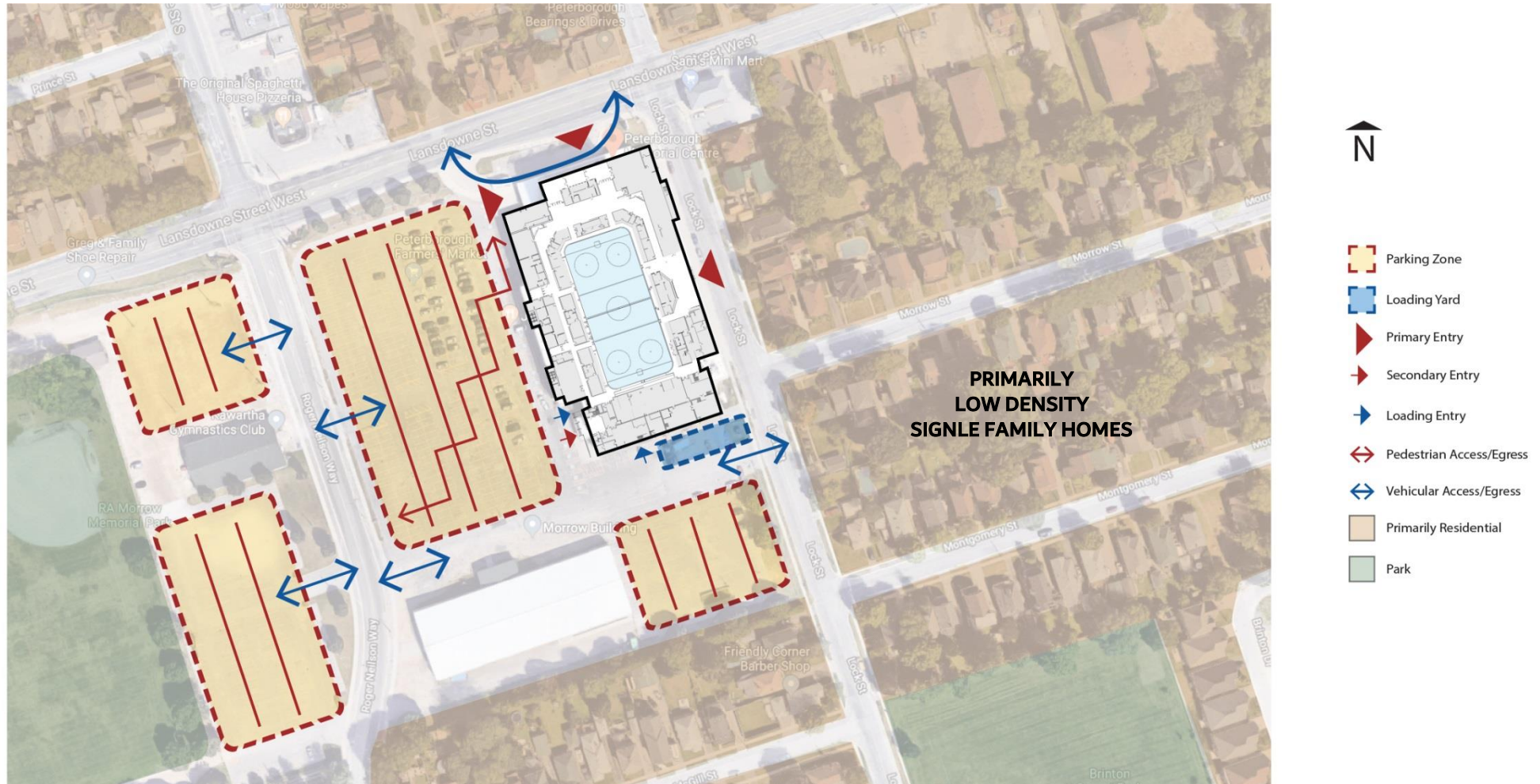
What viable locational options exist in Downtown Peterborough? Elsewhere?

What are the alternative futures for the PMC?



# PMC FINDINGS TO DATE

# THE CONTEXT OF THE PMC



# THE CHALLENGES

## HISTORY OF INVESTMENT

### Approximate Capital Costs

| <u>Date</u>         | <u>Nominal \$</u> |
|---------------------|-------------------|
| 1956                | 941,675           |
| 2003                | 14.0M             |
| 2007                | 242,900           |
| 2008                | 37,700            |
| 2017                | 1.17M             |
| 2018                | 1.42M             |
| 2019                | 3.40M             |
| <u>2020 to 2030</u> | <u>4.00M</u>      |
| <b>TOTAL</b>        | <b>\$25.21 M+</b> |

*Source: City of Peterborough*

## BUILDING CHALLENGES

These can generally be divided into two categories:



### FUNCTIONAL CHALLENGES



### BUILDING CONDITION

**GIVEN THE ANTICIPATED CAPITAL COSTS, BUILDING CONDITION AND THE LOCAL LOW DENSITY RESIDENTIAL CONTEXT, IT IS BECOMING INCREASINGLY TIMELY FOR THE CITY OF PETERBOROUGH TO CONSIDER A NEW SPECIAL EVENTS FACILITY TO HOST MAJOR/JUNIOR SPORTS, ENTERTAINMENT, AND SPECIAL EVENTS.**

# THE CHALLENGES

## CIRCULATION FUNCTIONAL CHALLENGES

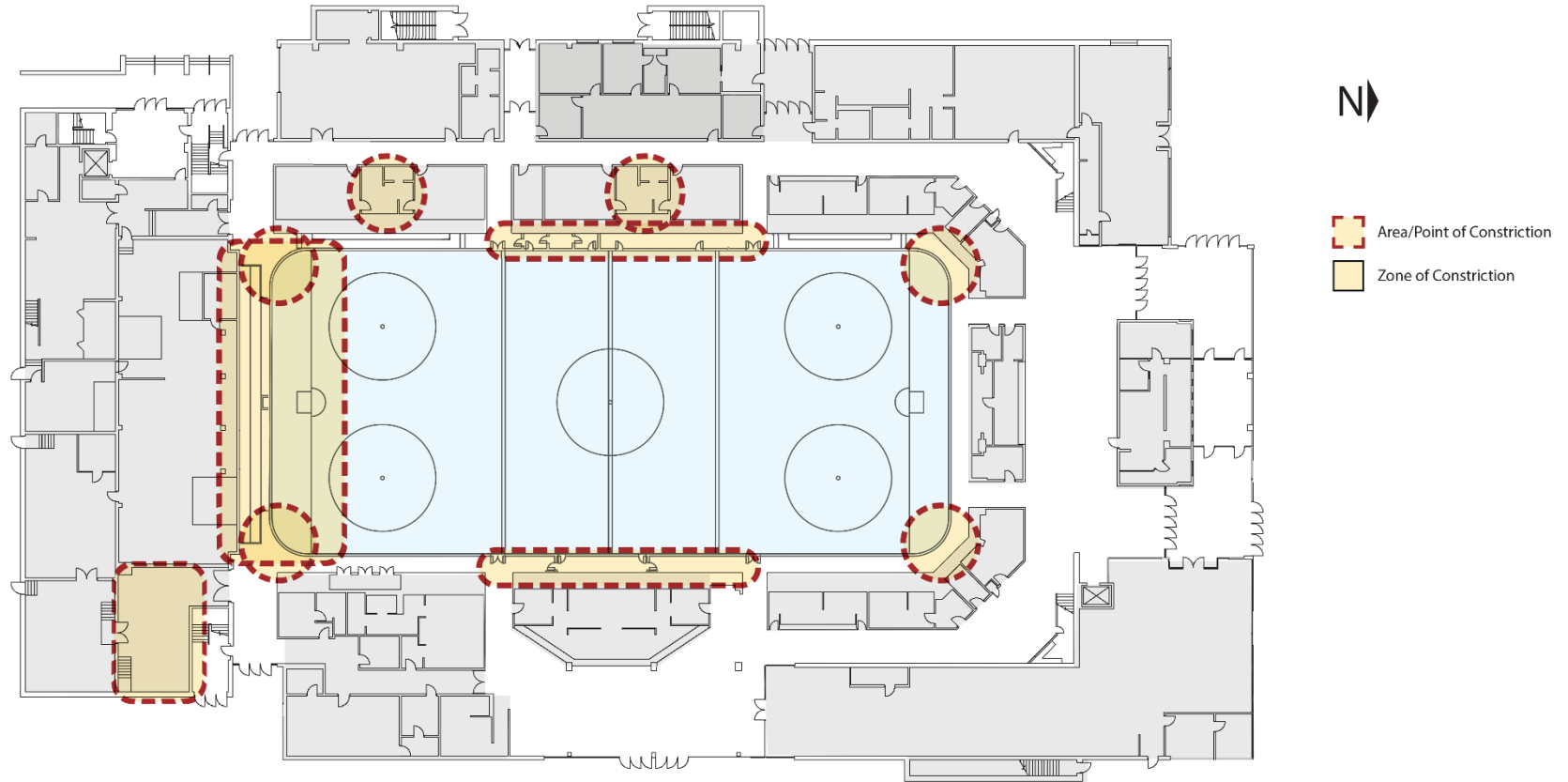
### EVENT LEVEL

- The main level concourse exhibits a general lack of breathing room and is undersized for maximum capacity events.
- Tight circulation is further compromised by a limited number of access points, queuing, and poor placement of kiosks and vendor tables.

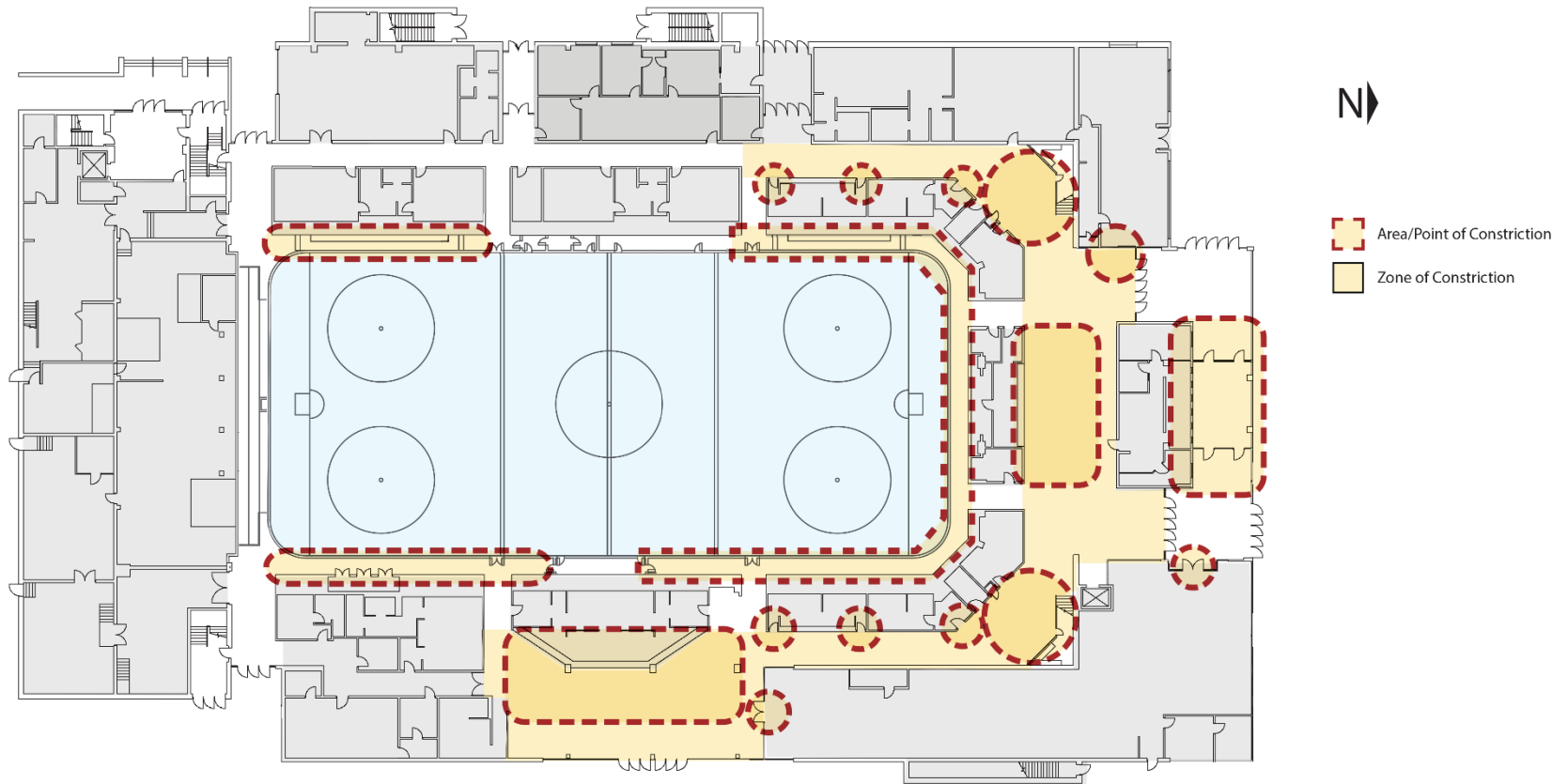
### SPECTATOR LEVEL

- Seat spacing is tight throughout the facility, with steep and restricted access aisles. These aspects negatively affect spectator level circulation.
- Access to seating areas is convoluted, and challenged to accommodate maximum capacity events.
- This is particularly evident in the north corners of the building, where barrier free viewing locations are often compromised.

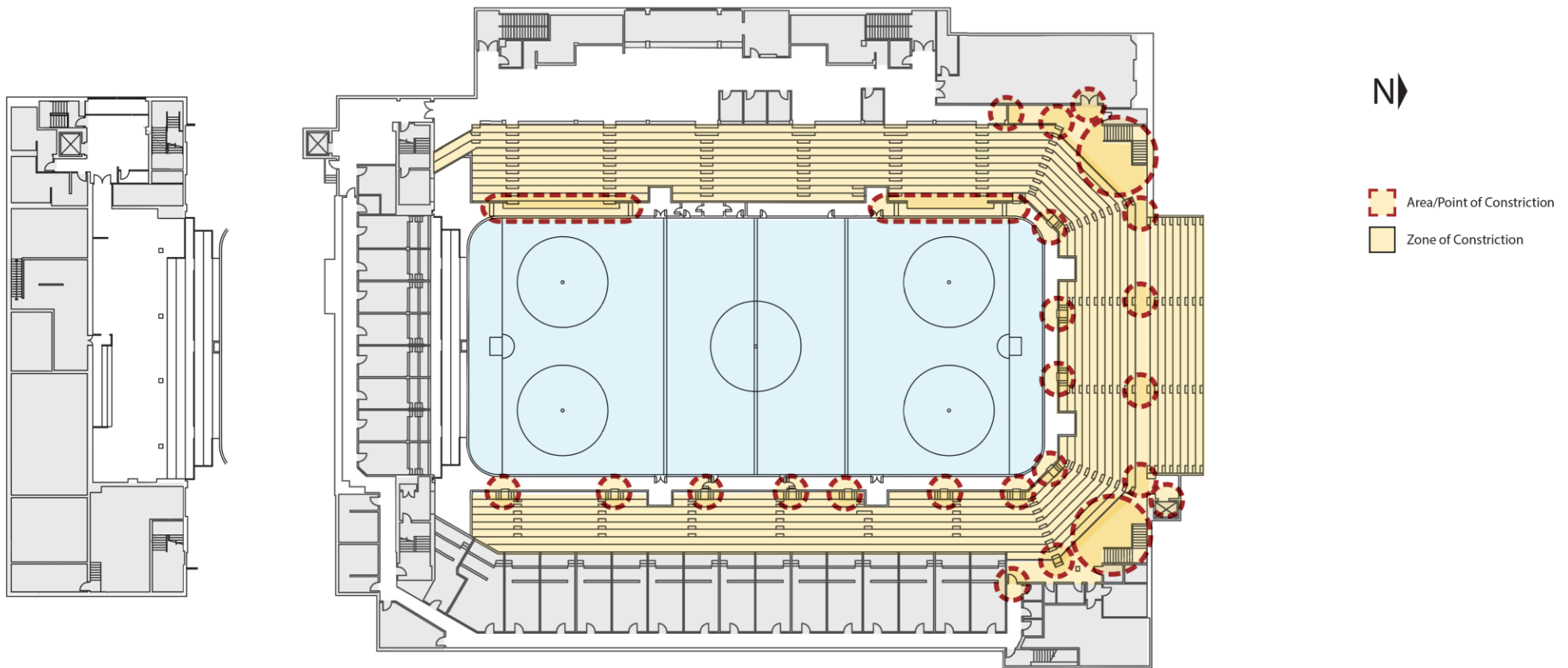
# THE CHALLENGES



# THE CHALLENGES



# THE CHALLENGES



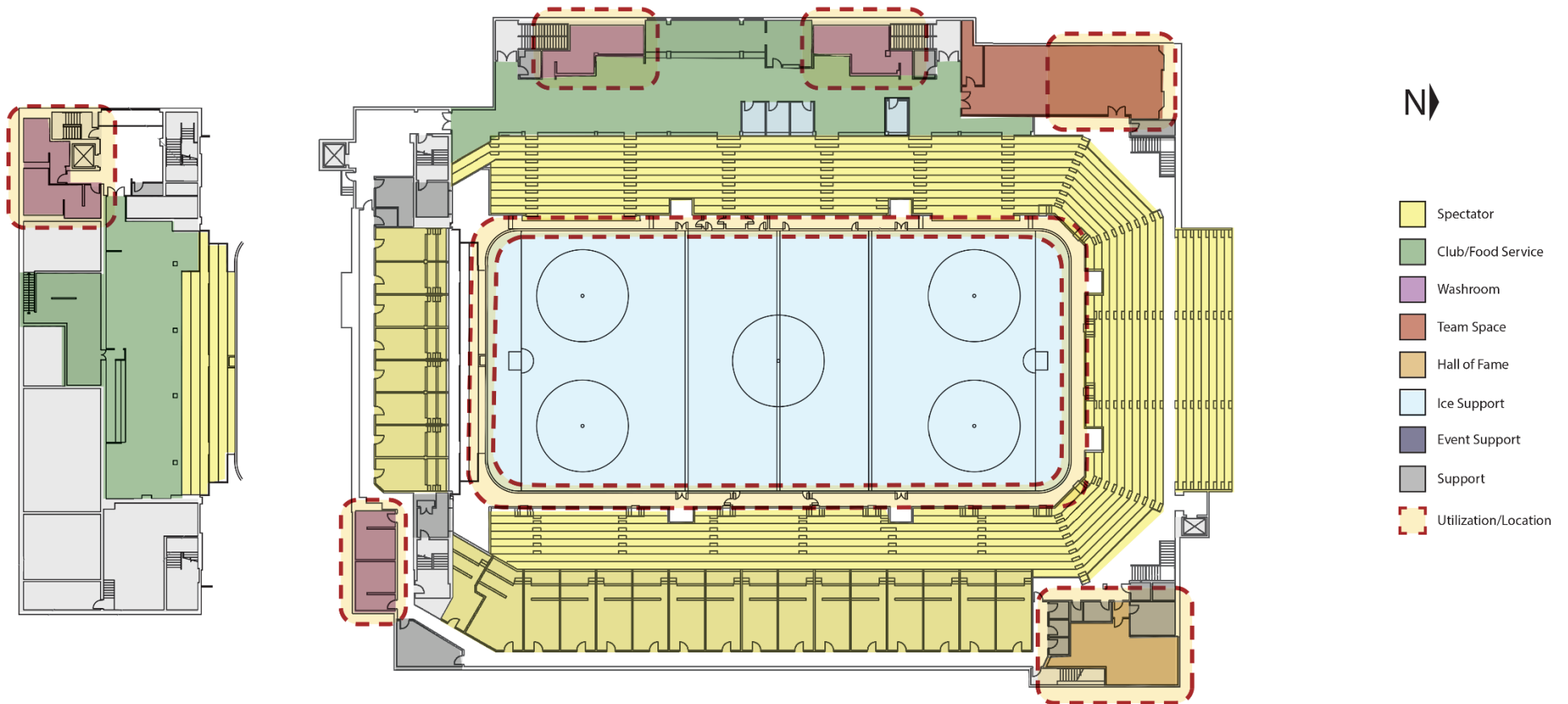
# THE CHALLENGES

## UTILIZATION/LOCATION FUNCTIONAL CHALLENGES

- The number of public washroom facilities appear to be undersized, and fixtured for maximum occupancy events.
- Petes team space is undersized, and poorly arranged with respect to current OHL and Major Series Lacrosse standards. It's front-of-house- location is not the highest and best use of prime revenue generating frontage, and causes spectator participant circulation conflicts.
- The Centre falls significantly short in meeting basic demands of cotemporary shows and special events (the back of house loading, staging, etc.)

**GIVEN THE ROBUST NATURE OF THE CENTRE'S CONCRETE STRUCTURE, AND THE PLACEMENT OF THE EXECUTIVE SUITES, THE TOTAL SEAT COUNT IS FIXED FOR THE FORESEEABLE FUTURE.**

# THE CHALLENGES



# THE OPPORTUNITIES

## THE MARKET FOR EVENTS | CURRENT AND COMPARATIVE PERFORMANCE OF THE PMC

### 5-Year Event Hosting Trends at the PMC (Total Events by Type of Event)

|                        | 2013      | 2014*     | 2015      | 2016*     | 2017*     | 5-Year Total | 5 Year Average |
|------------------------|-----------|-----------|-----------|-----------|-----------|--------------|----------------|
| Lakers                 | 14        | 16        | 15        | 16        | 15        | 76           | 15             |
| Petes                  | 36        | 40        | 39        | 39        | 41        | 195          | 39             |
| Other Sports Events    | 3         | 5         | 3         | 3         | 6         | 20           | 4              |
| Concerts               | 3         | 3         | 3         | 4         | 6         | 19           | 4              |
| Theatre/Live Show      | 0         | 1         | 0         | 1         | 1         | 3            | 1              |
| Family Entertainment   | 1         | 0         | 0         | 0         | 2         | 3            | 1              |
| Trade Shows/Convention | 3         | 4         | 3         | 4         | 3         | 17           | 3              |
|                        | <b>60</b> | <b>69</b> | <b>63</b> | <b>67</b> | <b>74</b> | <b>333</b>   | <b>67</b>      |

\*Excludes 'Merchandise' days and 'Season Ticket' Sale Days

# THE OPPORTUNITIES

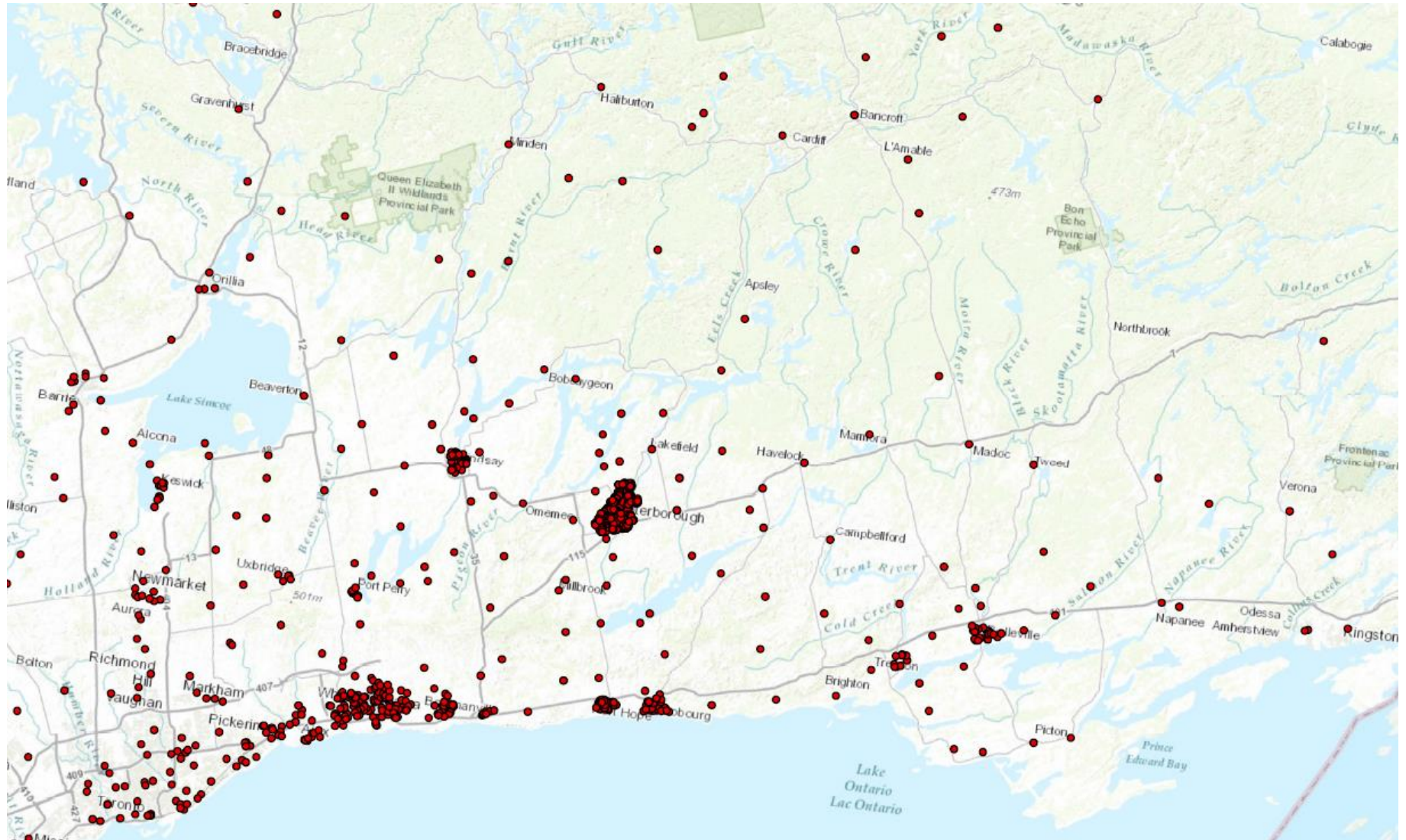
## THE MARKET FOR EVENTS | CURRENT AND COMPARATIVE PERFORMANCE OF THE PMC

|                        | PMC (2017 data) |             | K-Rock (2016 data) |             | Tribute CC (2017 data) |             |
|------------------------|-----------------|-------------|--------------------|-------------|------------------------|-------------|
| Category               | No. Events      | Events %    | No. Events         | Events %    | No. Events             | Events %    |
| OHL Hockey             | 41              | 55%         | 41                 | 51%         | 41                     | 46%         |
| Lacrosse               | 15              | 20%         | 0                  | 0%          | 15                     | 17%         |
| Other Sports Events    | 6               | 8%          | 9                  | 11%         | 7                      | 8%          |
| Concerts               | 6               | 8%          | 13                 | 16%         | 12                     | 13%         |
| Theatre/Live Show      | 1               | 1%          | 2                  | 3%          | 1                      | 1%          |
| Family Entertainment   | 2               | 3%          | 2                  | 3%          | 4                      | 4%          |
| Trade Shows/Convention | 3               | 4%          | 7                  | 9%          | 8                      | 9%          |
| Community              | 0               | 0%          | 6                  | 8%          | 2                      | 2%          |
| <b>Total</b>           | <b>74</b>       | <b>100%</b> | <b>80</b>          | <b>100%</b> | <b>90</b>              | <b>100%</b> |

*Source: Sierra Planning and Management. Data for the K-Rock and Tribute facilities is based on the latest available online event calendar and published business planning reports for each of these facilities and may not be complete.*

# THE OPPORTUNITIES

## THE MARKET FOR EVENTS | PMC CONCERT TICKET SALES BY POSTAL CODE FOR THE 2017



Source: Sierra Planning and Management based on data provided by the City of Peterborough

# THE OPPORTUNITIES

## THE MARKET FOR EVENTS | PMC CONCERT TICKET SALES BY POSTAL CODE FOR THE 2017

### 2010 Events Attendance (excl. OHL and Lakers)

| General Area   | Patrons | %      |
|--|---------|--------|
| 1 City of Peterborough   | 11,743  | 53.0%  |
| 2 Peterborough County and North Hastings County<br>Lindsay, Kawartha Lakes, Haliburton, West | 3,926   | 17.7%  |
| 3 Northumberland County<br>Belleville, Trenton, Cobourg, Port Hope, Quinte                   | 1,816   | 8.2%   |
| 4 Shores East  | 1,297   | 5.9%   |
| 5 Oshawa, Whitby, Pickering, Ajax, West Durham   | 313     | 1.4%   |
| 6 Bowmanville, Newcastle, Courtice, East Durham  | 264     | 1.2%   |
| 7 Toronto  | 560     | 2.5%   |
| 8 Frontenac, Lennox and Addington County   | 76      | 0.3%   |
| 9 Other: Renfrew /Lanark   | 23      | 0.1%   |
| 10 Port Perry/Uxbridge   | 40      | 0.2%   |
| Sub-Total  | 20,058  | 90.6%  |
| Other  | 2,091   | 9.4%   |
| Total  | 22,149  | 100.0% |

### 2014 Events Attendance (excl. OHL and Lakers)

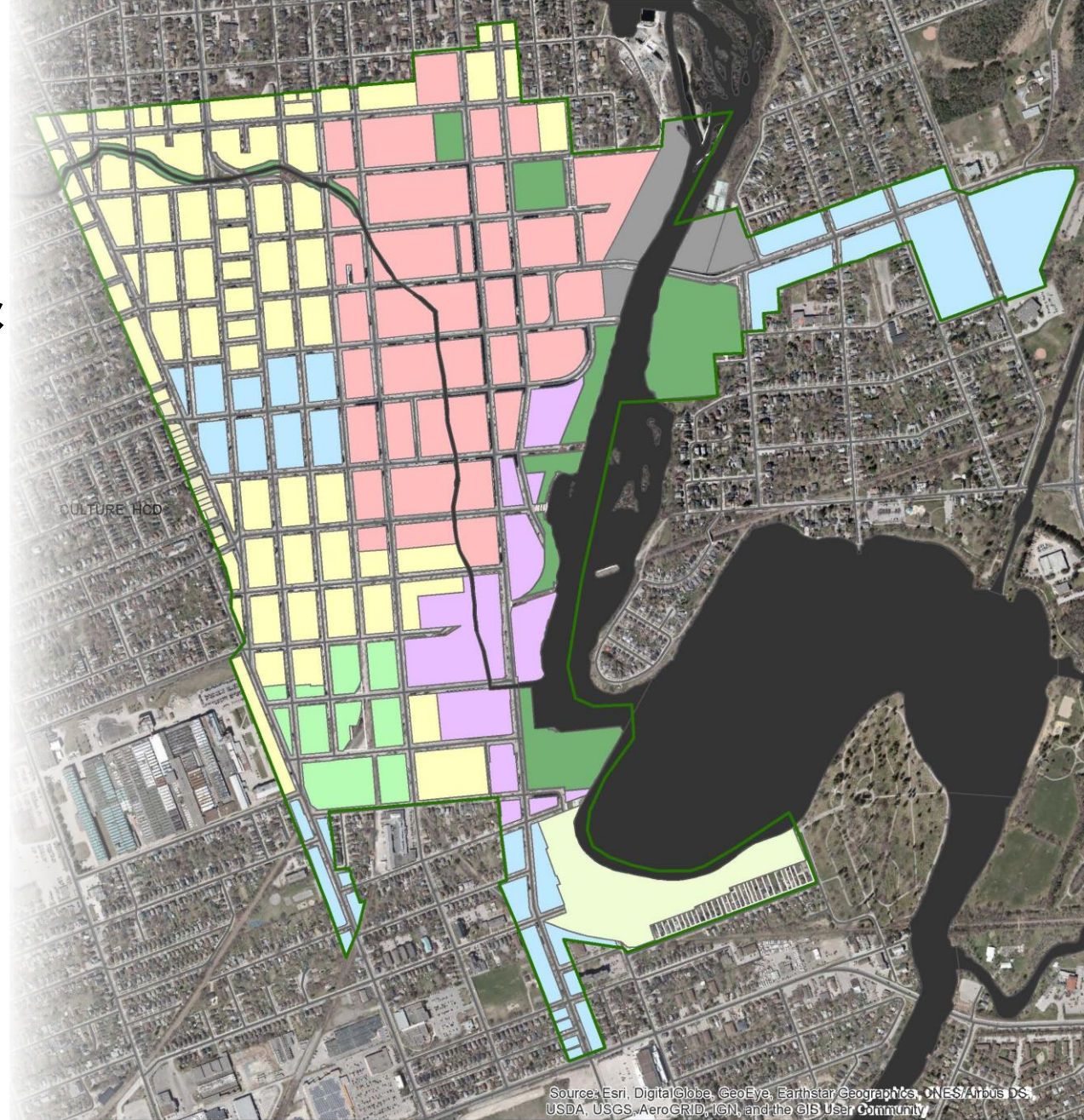
| General Area   | Patrons | %      |
|--|---------|--------|
| 1 City of Peterborough   | 9,875   | 51.0%  |
| 2 Peterborough County and North Hastings County<br>Lindsay, Kawartha Lakes, Haliburton, West         | 2,969   | 15.3%  |
| 3 Northumberland County<br>Belleville, Trenton, Cobourg, Port Hope, Quinte                           | 1,403   | 7.2%   |
| 4 Shores East  | 1,002   | 5.2%   |
| 5 Toronto  | 822     | 4.2%   |
| 6 Ottawa and National Capital Region   | 498     | 2.6%   |
| 7 Oshawa, Whitby, Pickering, Ajax, West Durham   | 377     | 1.9%   |
| 8 Bowmanville, Newcastle, Courtice, East Durham<br>Port Perry/Uxbridge, Keswick, Barrie, Lake Simcoe | 246     | 1.3%   |
| 9 North Shore, Newmarket   | 179     | 0.9%   |
| 10 Mississauga, Burlington, Hamilton, Brampton Caledon   | 128     | 0.7%   |
| 11 International   | 82      | 0.4%   |
| 12 Kingston  | 38      | 0.2%   |
| 13 Other: Renfrew /Lanark  | 22      | 0.1%   |
| Sub-Total  | 17,641  | 91.1%  |
| Other  | 1,731   | 8.9%   |
| Total  | 19,372  | 100.0% |

### 2017 Events Attendance (excl. OHL and Lakers)

| General Area   | Patrons | %      |
|--|---------|--------|
| 1 City of Peterborough   | 10,642  | 46.2%  |
| 2 Peterborough County and North Hastings County<br>Lindsay, Kawartha Lakes, Haliburton, West | 4,252   | 18.5%  |
| 3 Northumberland County<br>Belleville, Trenton, Cobourg, Port Hope, Quinte                   | 2,119   | 9.2%   |
| 4 Shores East  | 1,819   | 7.9%   |
| 5 Oshawa, Whitby, Pickering, Ajax  | 553     | 2.4%   |
| 6 Bowmanville, Newcastle, Courtice, East Durham  | 417     | 1.4%   |
| 7 Toronto  | 360     | 1.6%   |
| 8 International  | 257     | 1.6%   |
| 9 Other: Renfrew /Lanark, London   | 215     | 0.9%   |
| 10 Port Perry/Uxbridge, Keswick, Barrie  | 146     | 0.6%   |
| Sub-Total  | 20,780  | 90.2%  |
| Other  | 2,259   | 9.8%   |
| Total  | 23,039  | 100.0% |

# STUDY AREA & CONSTRAINTS

## CENTRAL AREA | LAND USE



Source: Esri, DigitalGlobe, GeoEye, Earthstar Geographics, CNES/Airbus DS, USDA, USGS, AeroGRID, IGN, and the GIS User Community

### Peterborough, ON

Central area parcels with no known constraints

#### Legend

- Central Area Boundary
- Parcels - No known constraints
- Heritage Conservation District
- Parking Lots
- Schools

#### Land Use

- BUSINESS DISTRICTS
- COMMERCIAL CORE AREA
- INDUSTRIAL AREA
- INDUSTRIAL CONVERSION AREA
- OPEN SPACE AREA
- SPECIAL POLICY AREA
- TRANSITIONAL USES AREA
- WATERFRONT COMMERCIAL AREA

#### Constraints

- ORCA Floodplain
- Hydrography
- Parcels containing points
- Culture Heritage Register
- Culture Designated
- ▲ Old Industry

City of Peterborough | Feasibility Study for a Major Sports and Entertainment Centre

# STUDY AREA & CONSTRAINTS

CENTRAL AREA | FLOOD PLAIN



Peterborough, ON

Central area parcels with  
no known constraints







## Legend

-  Central Area Boundary
-  Parcels - No known constraints
-  Heritage Conservation District
-  Parking Lots
-  Schools

## Land Use

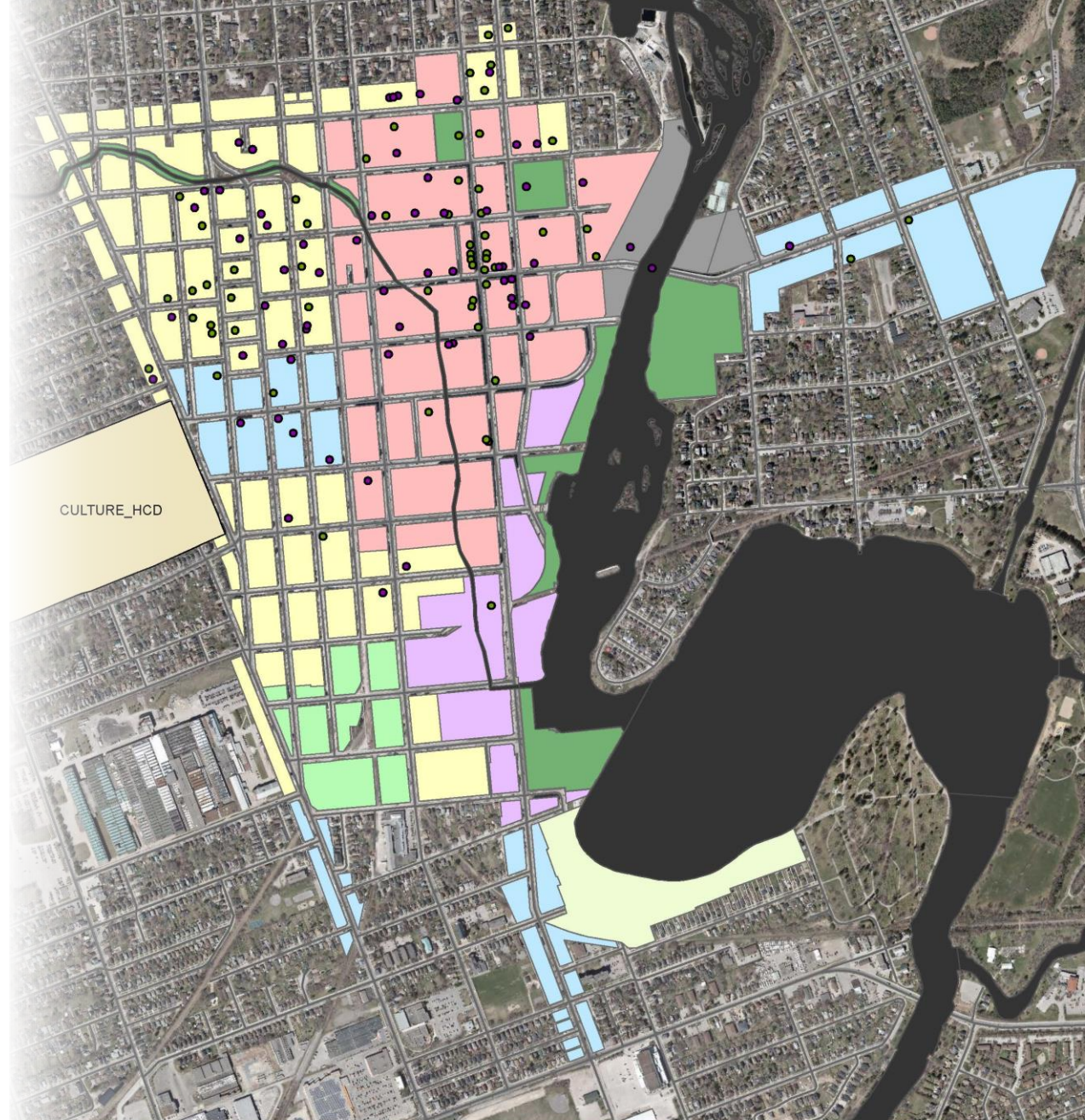
-  BUSINESS DISTRICTS
-  COMMERCIAL CORE AREA
-  INDUSTRIAL AREA
-  INDUSTRIAL CONVERSION AREA
-  OPEN SPACE AREA
-  SPECIAL POLICY AREA
-  TRANSITIONAL USES AREA
-  WATERFRONT COMMERCIAL AREA

## Constraints

-  ORCA Floodplain
-  Hydrography
-  Parcels containing points
-  Culture Heritage Register
-  Culture Designated
-  Old Industry

# STUDY AREA & CONSTRAINTS

## CENTRAL AREA | HERITAGE BUILDINGS



Peterborough, ON

Central area parcels with  
no known constraints

### Legend

- Central Area Boundary
- Parcels - No known constraints
- Heritage Conservation District
- Parking Lots
- Schools

### Land Use

- BUSINESS DISTRICTS
- COMMERCIAL CORE AREA
- INDUSTRIAL AREA
- INDUSTRIAL CONVERSION AREA
- OPEN SPACE AREA
- SPECIAL POLICY AREA
- TRANSITIONAL USES AREA
- WATERFRONT COMMERCIAL AREA

### Constraints

- ORCA Floodplain
- Hydrography
- Parcels containing points
- Culture Heritage Register
- Culture Designated
- Old Industry

City of Peterborough | Feasibility Study for a Major Sports and Entertainment Centre

# STUDY AREA & CONSTRAINTS

## CENTRAL AREA | PARKING



Peterborough, ON

Central area parcels with  
no known constraints

### Legend

- Central Area Boundary
- Parcels - No known constraints
- Heritage Conservation District
- Parking Lots
- Schools

### Land Use

- BUSINESS DISTRICTS
- COMMERCIAL CORE AREA
- INDUSTRIAL AREA
- INDUSTRIAL CONVERSION AREA
- OPEN SPACE AREA
- SPECIAL POLICY AREA
- TRANSITIONAL USES AREA
- WATERFRONT COMMERCIAL AREA

### Constraints

- ORCA Floodplain
- Hydrography
- Parcels containing points
- Culture Heritage Register
- Culture Designated
- Old Industry

# MAJOR CRITERIA FOR LOCATIONAL ASSESSMENT

## ■ SITE CHARACTERISTICS, LOCATION AND TRANSPORTATION

- Capacity to Accommodate Building Footprint
- Parking Availability On-site and Off - site (both public and private) Within 5 Minute Walking Radius
- Local and Regional Automobile Access / Egress
- Ease of Access via Local Public Transit

## ■ COSTS AND EASE OF ACQUIRING DEVELOPMENT LAND

- Cost of Land Acquisition
- Likelihood of site (in relative terms) to generate extraordinary development costs

## ■ URBAN CONTEXT / PHYSICAL ELEMENTS

- Capacity for Urban Regeneration
- Urban design opportunity to create a signature building and focus

## ■ ECONOMIC IMPACT / SYNERGY WITH DOWNTOWN

- Impact on Existing Local Retail/Commercial Sectors
- Potential to Attract New Local Retail/Commercial/Accommodation etc.

# TELL US YOUR THOUGHTS

# WHAT DO YOU THINK?

**1**

**What has your experience been with the PMC as a venue?**

**2**

**Based on our presentation materials, do you think the City of Peterborough needs a new Sports and Entertainment Centre?**

- What should be in the building? (What core functions and services should a new multi-use sports and entertainment centre have?)
- Is it a priority?

**3**

**Which of the locational criteria we have discussed do you think are most important?**

# WHAT DO YOU THINK?

**4**

**In general terms based on what we've discussed, which general locations are preferred?**

- a. Central Downtown**
- b. Near Downtown**
- c. Visible Gateway location**

**5**

**What should the future of the PMC be?**

# REUSE OPTIONS FOR THE PMC

## ALTERNATIVE RECREATION



**Climbing Wall**



**Wellness Centre**

# REUSE OPTIONS FOR THE PMC

## ALTERNATIVE RECREATION



**Courts**

# REUSE OPTIONS FOR THE PMC

## CIVIC SERVICES



**Childcare**



**Library**

# REUSE OPTIONS FOR THE PMC

## SALE TO THE PRIVATE SECTOR



**Maker Space**

# REUSE OPTIONS FOR THE PMC

## SALE TO THE PRIVATE SECTOR



**Retail**