

Stadium Concept Review: A Summary Report



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Executive Summary



This summary report excludes certain confidential financial information and commentary prepared for the Government of Saskatchewan

Executive Summary

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- Four options were reviewed based on the premise that the existing stadium needed to be redeveloped or a new stadium built.
 - Options were evaluated on basis of:
 1. Cost and completion dates;
 2. Economic impact (during and after construction);
 3. Impact on patron experience; and,
 4. Funding potential and integration with Regina Downtown.
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Executive Summary

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#1.Minor Renovations to Mosaic Stadium

- \$1-\$6 million ‘essential capital investment’ redevelopment over one to two years with minor economic impact during construction and no change in ongoing economic impact.

#2.Major Redevelopment of Mosaic Stadium

- 4 phase \$109 million redevelopment completed over 5 years with moderate economic impact during construction but minimal change in ongoing economic impact.

#3.Open Air Stadium

- \$190 million plus land constructed over three to four years.
- 38,000 seat capacity expandable to 50,000+.
- Limited potential to integrate with Regina downtown area due to seasonality of use.
- Moderate economic impact during construction and moderate ongoing economic impact.

#4.All-Weather Multi-Use Stadium

- \$350 million (depending on design) plus land costs and ancillary construction to build a 38,000 seat stadium (expandable to 50,000+) constructed over three to four years with the potential for a retractable roof system.
 - Built in the downtown area.
 - Will substantially expand ability to meet a wide cross section of community needs.
 - Substantial economic impact during construction and substantial ongoing economic impact.
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Executive Summary

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- Building an All Weather Multi-Use Stadium presents a ‘Generational Opportunity’ for Regina and Saskatchewan residents and is the preferred option.
 - Ability to serve a much broader group of stakeholders.
 - An additional 6 months of stadium use in a year round all weather multi-use venue.
 - Substantial economic impact during construction (\$525 million) and from ongoing operations (\$58.5 million per year).
 - Revitalize Downtown.
 - National Stage presence with a Signature facility.
 - Significant opportunity to integrate the stadium with the downtown.
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Introduction and Background



Scope of the Concept Review

- **Included in the Scope of the Review was to:**
 - Consult with the City of Regina, the Saskatchewan Roughrider Football Club Inc. and others as required to fully understand the requirements of each.
 - Assess the need for a new/revitalized stadium facility.
 - Review the issues, merits and viability of four options:
 - ✦ Major Redevelopment of Mosaic Stadium.
 - ✦ Construction of a new All-Weather Multi-Use Stadium.
 - ✦ Minor Renovation of Mosaic Stadium.
 - ✦ Construction of a new Open Air Stadium.
 - Identify/Review/Benchmark comparable stadiums (costs, usage, design, locations, management, etc).
 - Assess at a high level the direct and indirect economic impact of the various options.
 - Provide other related advice as directed.
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Activities Undertaken

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- **Activities that were undertaken for the Review included:**
 - Reviewed related reports and materials prepared by others.
 - Visited and toured the following facilities:
 - ✦ Air Canada Centre (Toronto)
 - ✦ Rogers Centre (Toronto)
 - ✦ FargoDome (Fargo, North Dakota)
 - ✦ John Labatt Centre (London)
 - ✦ L.A. Live (Los Angeles)
 - ✦ University of Phoenix Stadium (Phoenix)
 - ✦ Wachovia Center (Philadelphia)
 - Reviewed information from public sources on a wide range of ‘domed’ stadiums internationally.
 - Reviewed information on stadium management companies.
 - Held meetings with leading stadium management firms.
 - Held meetings/corresponded with senior government officials.
 - Meeting with the Mayor of Regina, City officials, management and directors of the Saskatchewan Roughrider Football Club Inc.
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Activities Undertaken

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- Reviewed other available operational/financial information relating to:
 - ✦ B.C. Pavilion Corporation (B.C. Place)
 - ✦ Metropolitan Sports Facilities Commission (Minneapolis Metro Dome)
 - ✦ The FargoDome
 - ✦ University Sports and Tourism Authority (University of Phoenix Stadium)
 - ✦ The Saskatchewan Roughrider Football Club Inc.
 - Reviewed economic impact reports, including reports relating to the FargoDome and the 2006 Rolling Stone concerts in Regina.
 - Analyzed Saskatchewan Roughrider Football Club Inc. attendance and market demographic information (e.g., game day attendance demographic and ticket distribution by area, radio listenership data from Harvard Broadcasting).
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Need for a New or Revitalized Stadium

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- Mosaic Stadium although structurally sound is dated (built in 1910 and added to over the years).
 - Its initial design and subsequent expansions significantly limits the current and future patron experience and Saskatchewan Roughrider Football Club Inc. operations:
 - The facility needs to be expanded to meet growing demand and its use is seasonally restricted.
 - Concession and retail operations are restricted, limiting revenue generation opportunities.
 - Bench seating needs to be replaced to meet seating expectations, comfort and safety.
 - Football operations/administration efficiencies are being compromised as they are being moved off site due to lack of suitable space.
 - Concert opportunities are limited by weather related risks.
 - Ability to host major events such as the Grey Cup will become questionable based on changing league expectations for facilities hosting the event.
 - Customer access and circulation to and from seats, through the stadium and in and out of the stadium is a challenge.
 - Access, circulation routes, security and emergency systems need to be improved.
 - Washroom access is limited by placement and circulation routes.
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Established in 1910, converted to football in 1927 and renovated numerous times during the past 98 years as additional seating and facilities were added to what is now Mosaic Stadium.

One of the oldest stadiums in North America.

- 1910 - Field constructed for rugby – named Park Hughes.**
- 1927 - Park de Young (which was adjacent to Park Hughes) were reconfigured to provide a better venue for football fans. Seating and parking were added. Park de Young became the name for the reconfigured park.**
- 1936 - Seating built to accommodate growing crowds. Also, press box was built and facilities were provided for radio broadcasts of games.**
- 1946 - Regina Recreation Board approves seeding the field to provide a quality surface.**
- 1947 - Park de Young renamed Taylor Field.**
- 1948 - \$47,000 invested to build new 4,500 seat concrete grand stand on the west side.**
- 1966 - East side concrete grandstand constructed.**
- 1978 - West grandstand expansion. The expansion included additional seating on the main grandstand level, the addition of the second level, as well as new offices and dressing room facilities. This increased seating capacity by 8,500, approximate value of \$9M.**
- 1979 - Artificial turf (Super Turf) installed.**
- 1988 - Replaced the first artificial turf with Omniturf.**
- 1995 - In conjunction with the 1995 Grey Cup, existing west side press box renovated resulting in new club seating. East side club seating and press box section also built.**
- 2000 - Omniturf replaced by Astroturf.**
- 2005 - Maxtron installed along with a new sound system installed.**
- 2006 - Taylor Field now called Mosaic Stadium at Taylor Field.**
- 2007 - Fieldturf installed.**

Historical Context

2009 Season –
Saskatchewan
Roughrider Football
Club Inc. 100th
Anniversary.

Stadium capacity can't
meet the current Season
Ticket demand and
expected single ticket
sales.

Saskatchewan's next
turn for the Grey Cup is
2013.

1. **Vancouver – \$365M provincially funded stadium renovation and roof replacement with a retractable roof.**
2. **Edmonton - \$40M jointly funded stadium upgrade by the city and club.**
3. **Calgary - \$15M provincially funded renovation of offices and field house.**
4. **Winnipeg – \$135M new open air stadium with \$15M Federal, \$20M Provincial, and \$100M Private funding (land donated by U of M).**
5. **Hamilton – Pending vote by the city to build a 25,000 seat stadium for the Pan Am games and Hamilton Tiger-Cats. Proposed as a joint Toronto (\$56m), and combined Hamilton and Private (\$96M) project.**
6. **Ottawa – Discussions of a new CFL franchise and redevelopment of the Frank Clair Stadium at Lansdowne Park. Also possible new MLS soccer stadium in Kanata.**
7. **Moncton -- 10,000 seat stadium with \$22.5 million Federal (\$7.5M), Provincial (\$6.5M), City (\$5) and university (\$3.5) project.**
8. **Montreal -- \$15 million, 5,000 seat expansion funded by Federal/Provincial/City.**

Current Context

Four Major Options



1 MINOR RENOVATIONS TO MOSAIC STADIUM

2 MAJOR REDEVELOPMENT OF MOSAIC STADIUM

3 OPEN AIR STADIUM

4 ALL WEATHER MULTI-USE STADIUM

#1 Minor Renovations to Mosaic Stadium

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- \$1-\$6 million 'essential capital investment' redevelopment over one to two years.
 - Extent of investment depends on decision to meet short term care and maintenance investments or minimal mid-term investment as a go forward operation.
 - No significant change in facility.
 - No changes that would impact demand or ability to serve a wider or larger group of patrons.
 - Minor economic impact during construction and no change in ongoing economic impact.
 - Would likely meet the CFL requirements to attract the 2013 Grey Cup, which is Saskatchewan's next turn.
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#2 Major Redevelopment of Mosaic Stadium

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- 4 phase \$109 million redevelopment completed over 5 years 30,000 regular seat capacity.
 - Scope of stadium usage would stay the same.
 - Would moderately increase operating efficiency and customer experience at events and possibly create higher ticket sales.
 - Moderate economic impact during construction, with minor change in ongoing economic impact resulting from improved revenue and service opportunities.
 - Would be ready for the 2013 Grey Cup, which is Saskatchewan's next turn.
 - Would defer the need to make a replacement decision for 10-15 years.
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#3 Open Air Stadium

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- \$190 million plus land (based on a scaling of the proposed Winnipeg Stadium estimates, design and location choice) for a 38,000 seat capacity stadium (expandable to 50,000+) built over three to four years.
 - Location in Exhibition Park area or 'Outskirts' of Regina (University area, North End-Highway 11 area) depending on integration opportunities.
 - While 38,000 seats provides opportunity for anticipated future growth it would currently only need that capacity during special games and events.
 - The Saskatchewan Roughrider Football Club Inc. would want to study stadium size further to ensure it matches their needs.
 - As a properly designed modern stadium the patron/player/tenant experience would be moderately enhanced and contribute to some increase in demand and utilization.
 - Limited in its usage since conferences, conventions, concerts, floor displays and other activities usually require controlled climate conditions.
 - Limited potential to integrate with Regina downtown location due to seasonality of use (6-8 months per year).
 - Primarily the stadium would be a Saskatchewan Roughrider Football Club Inc. facility with additional community use as currently seen at Mosaic Stadium.
-

#3 Open Air Stadium

Winnipeg is proposing to build a \$135M open air stadium with 30K seating to host the Winnipeg Blue Bombers. The stadium replaces the CanadInn Stadium built in 1953 and extensively renovated in the late 1980s and in 1999. Land cost are not included and development of the old stadium lands is a condition of the deal.

- It would be more difficult to substantially fund the project and to attract external funding for a project that is limited in its scope and incremental impact.
- Moderate economic impact during construction and moderate ongoing economic impact (used 6-8 months per year and likely located outside of the downtown area)
- Would replace Mosaic Stadium and make available the old stadium lands for redevelopment.
- Lacks the appeal of a Signature facility anchoring the sports and entertainment corridor.
- Could be ready for the 2013 Grey Cup, which is Saskatchewan's next turn.
- For the incremental costs and benefits it would difficult to justify the expenditure compared to the \$109M Redevelopment of Mosaic Stadium.

#4 All Weather Multi-Use Stadium

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- \$350 million (depending on design) plus land costs and ancillary construction (parking, practice field, overhead walkways etc.) constructed over three to four years.
 - Potential for retractable roof system depending on design costs.
 - 38,000 seat capacity expandable to 50,000+.
 - The Saskatchewan Roughrider Football Club Inc. would want to study size further to ensure it matches their needs. A controlled environment with an improved game day experience would contribute to increased demand and utilization.
 - High potential to integrate with Regina downtown location due to year round use and ability to host conferences, conventions, concerts, floor displays and other activities in a controlled environment.
 - While 38,000 seats provides opportunity for anticipated future growth it would currently only need that capacity during special games and events.
-

#4 All Weather Multi-Use Stadium

Stockholm Soccer Stadium, 30,000 seat, estimated at \$271M to \$313M CDN construction cost, 3 yrs construction, completion 2012, retractable roof similar to Phoenix.

University of Phoenix Dome, 63,000 seats, expandable to 72,000 seats built in 3 years for ~\$400M USD (stadium only) with a retractable roof (that was less expensive than a fixed roof system).

- Would replace Mosaic Stadium and make available the old stadium lands for redevelopment.
- As a high profile project that will drive economic activity and the profile of the Province and the City, it will have greater appeal to attract funding support than a redevelopment or open air stadium.
- Will substantially expand ability to meet a wider cross section of community needs on a year round basis in a controlled environment.
- Substantial economic impact during construction and substantial ongoing economic impact.
- Signature facility that would act as the anchor for the sports and entertainment corridor and support tourism in Regina and area.
- Could be ready for the 2013 Grey Cup, which is Saskatchewan's next turn.
- Primarily the stadium would be a government owned or community based facility with the Saskatchewan Roughrider Football Club Inc. as the key anchor tenant.

Project Assessment Matrix



	Cost (millions)	Completion Date	Economic Impact – Construction/ Ongoing	Impact on Patron Experience	Funding Potential	Integration with Regina Downtown
Current Mosaic Stadium Operation						None
Minor Renovations of Mosaic Stadium	Low (\$1-6)	2009/2010	Low/Low	None	High	None
Major Redevelopment of Mosaic Stadium	Moderate (\$109)	2013	Moderate/Low	Low to Moderate	Low	None
Open Air Stadium	High (\$190)	2012/2013	Moderate/Moderate	Moderate	Low	None
All Weather Multi- Use Stadium	High (\$350)	2012/2013	High/High	High	High	High

Major Redevelopment vs All Weather Stadium

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- \$109 vs. \$350 million investment.
 - What is the Value of the \$241 million incremental cost?
 - Ability to serve a much broader group of stakeholders in a year round all weather multi-use venue.
 - Substantially more economic impact from new stadium construction/ongoing operations.
 - Anchor facility for the sports and entertainment corridor.
 - Revitalize Downtown.
 - National Stage presence with a Signature facility.
 - Free up the Mosaic Stadium property for redevelopment by City of Regina.
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Open Air Stadium vs All Weather Stadium

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- \$190 vs. \$350 million investment.
 - What is the Value of the \$160 million incremental cost?
 - Ability to serve a much broader group of stakeholders.
 - An additional 6 months of stadium use in a year round all weather multi-use venue.
 - Proportionally more economic impact during construction and substantially more impact from ongoing operations.
 - Anchor for the sports and entertainment corridor.
 - Revitalize Downtown.
 - National Stage presence with a Signature facility.
-

Economic Impact Considerations



Economic Impact Considerations

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- **Biggest drivers of economic impact:**
 - Out of area draws (15-25%) for major concerts and events with larger out of area draw for provincial, national and international events (tournaments, competitions, conventions and trade shows).
 - Events that involve over-night or multi-day stays.
 - Multi-use facility designs.
 - Downtown stadium location integrated into current business activity/locations.
 - Synergistic opportunities for tourism/venue visits.
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FargoDome Benchmark

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- Fargo-Moorhead population 175,000 population (3.5 hrs south of Winnipeg and 3 hours NNW of Minneapolis).
 - 19,200 (football) to 27,700 (full concert layout) seat multiuse stadium built for \$48 million in 1992:
 - 415,057 Event Attendees in 2007.
 - Average \$4 per attendee concession receipt.
 - \$28 million economic impact in 2007.
 - \$67.38 economic impact per 2007 attendee (excluding ticket revenue).
 - 100+ event days usage in 2007.
 - 1/3 of event visitors overnight in Fargo.
 - Positive operating profit every year (1993-2008).
 - In its first ten years, made a \$142 million direct economic impact and an additional \$320 million secondary economic impact on the area (excluding stadium ticket sales).
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Economic Impact – All Weather Stadium

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- **Construction Phase Economic Impact:**
 - \$350 million investment during construction with \$525 million economic impact (1.5 multiplier) over 4 years.
 - 1200 jobs per year during construction.
- **Annual Economic Impact (based on the FargoDome experience):**
 - Low-range of annual economic impact: \$27 million/yr.
 - Mid-range of annual economic impact: \$58 million/yr.
 - High-range of annual economic impact: \$90 million/yr.
 - 600 new direct and indirect jobs.
- **Notes:**
 - Economic impact multipliers range from 1.2 to 4.0 depending on how the area and demographics are defined. A conservative 1.5 multiplier was used in keeping with government practice.
 - Based on FargoDome's \$67.38 economic impact per 2007 attendee (excluding ticket revenue) and estimated usage of a new all weather stadium (see previous Potential Stadium Usage).
 - Low range scenario is less than the economic impact of the FargoDome which is half the size of the proposed all weather stadium.

Non-Economic Impact Considerations

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- **Biggest non-economic drivers:**
 - Civic pride.
 - Quality of life.
 - City as a destination choice.
 - Recruitment and retention.
 - National presence.
-

Other Considerations

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Other Considerations of the Review

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- **Stadium Funding Sources**
 - For the Stadium project to proceed with Government of Saskatchewan funding support, there will need to be significant funding support from the federal government, City of Regina and the private sector.
 - **Stadium and the Saskatchewan Roughrider Football Club Inc.**
 - There will need to be a fair and equitable rental/revenue sharing arrangement between the Stadium and the Saskatchewan Roughrider Football Club Inc.
 - **Stadium and other Venues**
 - There is potential for some operational conflict between the Stadium and other entertainment venues in Regina and Saskatoon.
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Other Considerations of the Review

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- **Potential for Operational / Financial Synergies**
 - There may be synergies to be gained through integrating Stadium operations with Casino Regina operations.
 - **Environmental Considerations**
 - Potential Geothermal HVAC as an energy strategy may enhance appeal and may be opportunity to access targeted funding opportunities (e.g. Sustainable Development Technology Canada) and donations.
 - Potential for a more energy efficient ‘partially buried’ stadium which could facilitate patron safety and movement.
 - Leverage green appeal and possible carbon credits.
 - Possible LEEDS project.
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Conclusions



Conclusions

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- Mosaic Stadium currently or in the very near future will require a substantial investment to redevelop it or replace it. Either option will require substantial provincial involvement and funding support.
 - An All Weather Multi-Use Stadium provides the greatest potential benefit to the Province, City and Stadium patrons in terms of economic impact, tourism potential, stadium experience, and pride.
 - An All Weather Multi-Use Stadium built in the downtown would stimulate (re)development and support growth in the downtown and warehouse district.
 - Due to the unique economic environment in Saskatchewan the province has been presented with a 'Generational Opportunity' to build a new stadium.
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Appendices



A.1 Field Dimensions Multi-use Facility



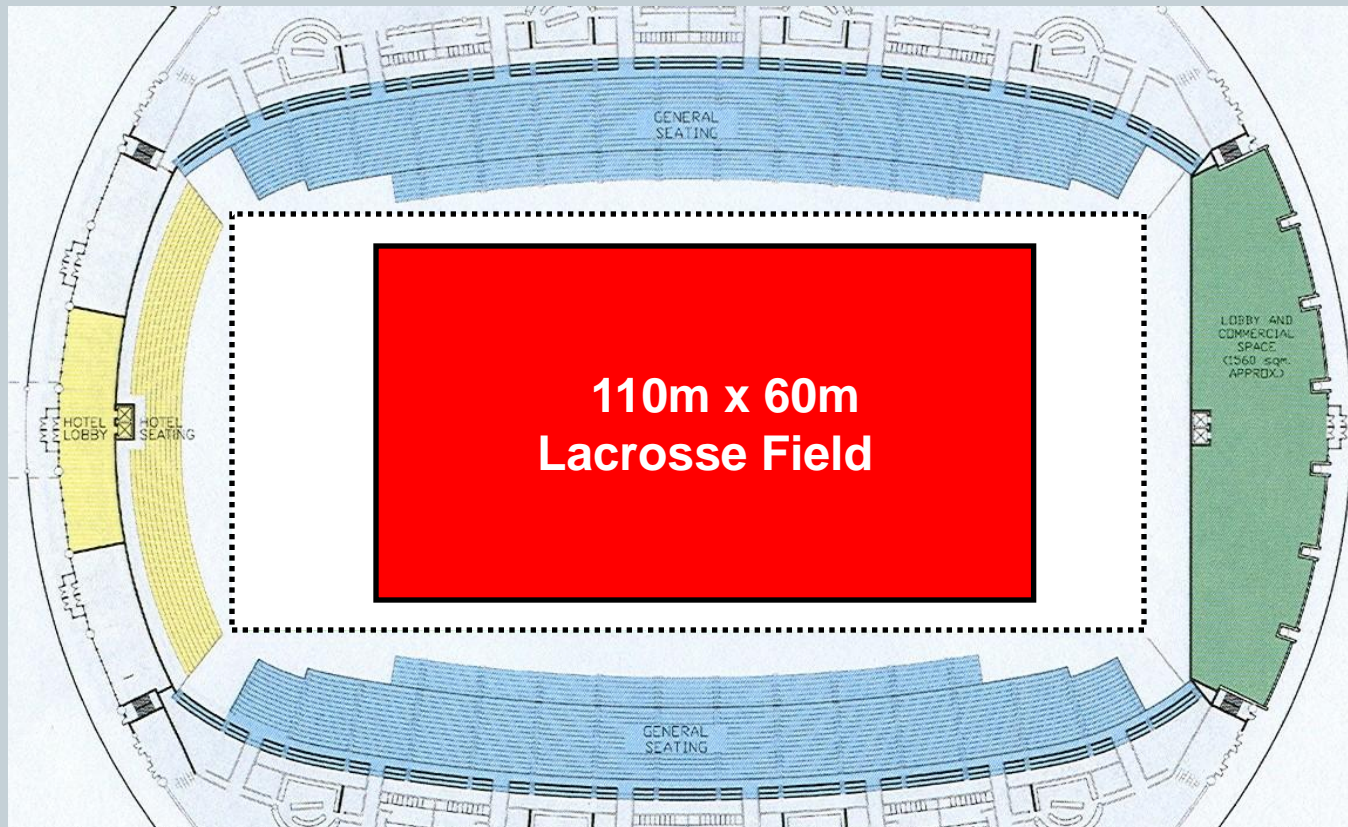
CFL Field Dimensions

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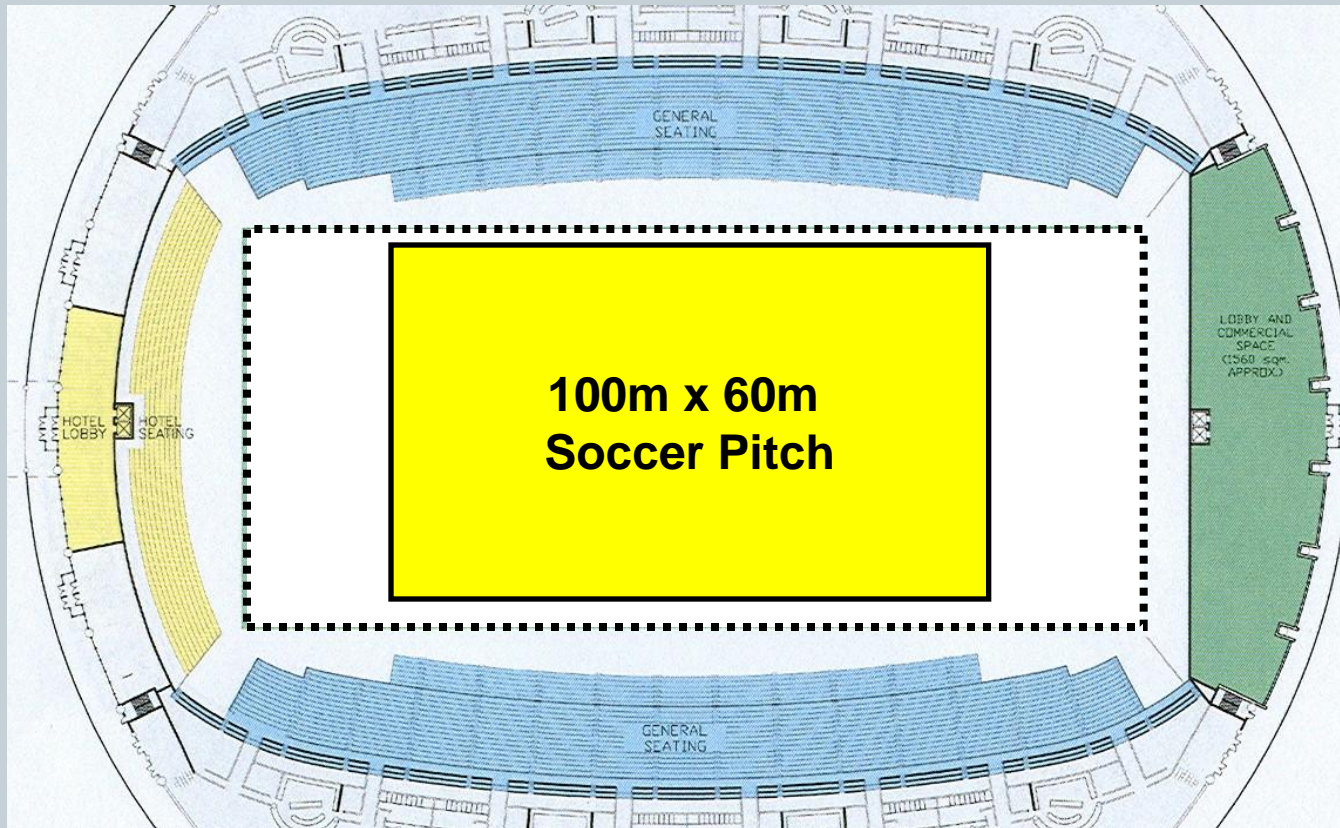
Lacrosse Field Dimensions (110m x 60m)

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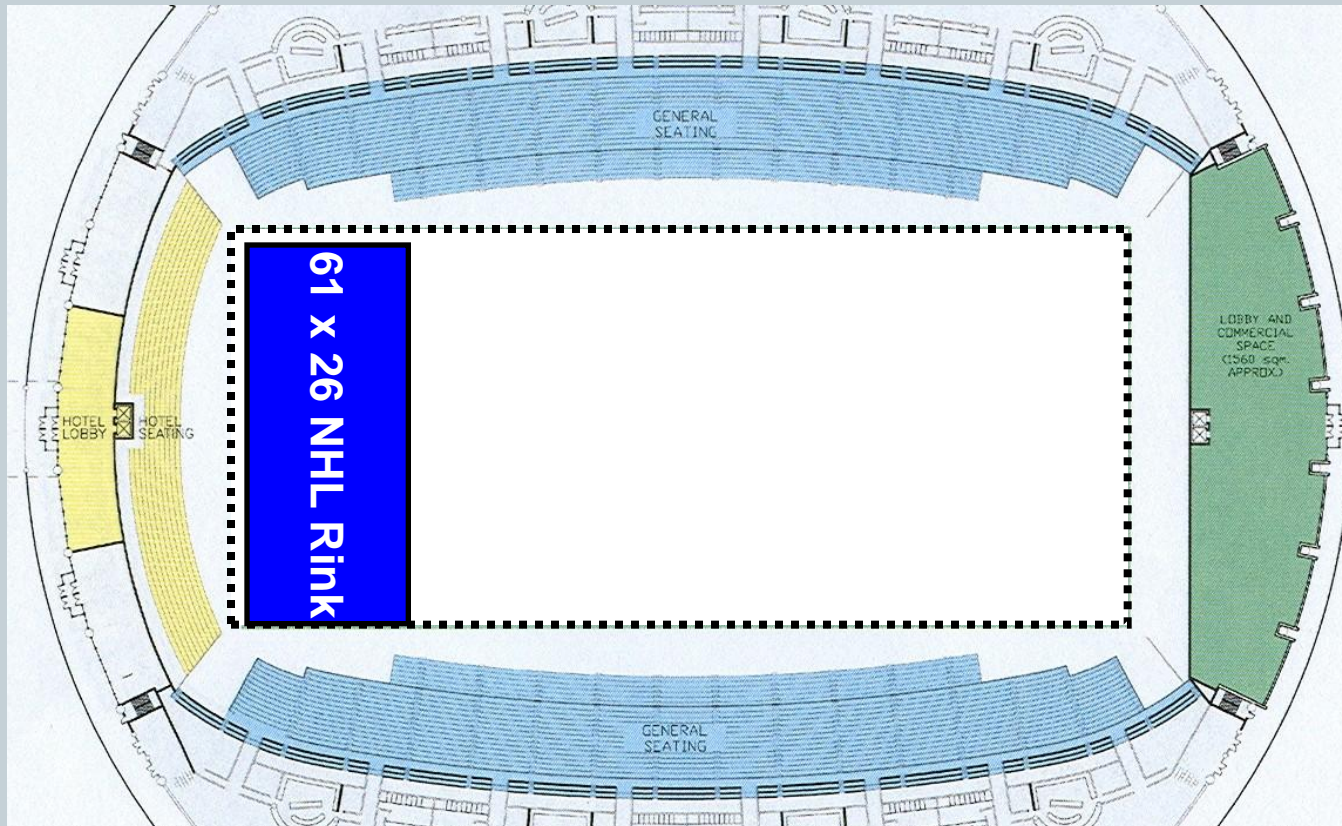
Soccer Pitch Dimensions (100m x 60m)

39



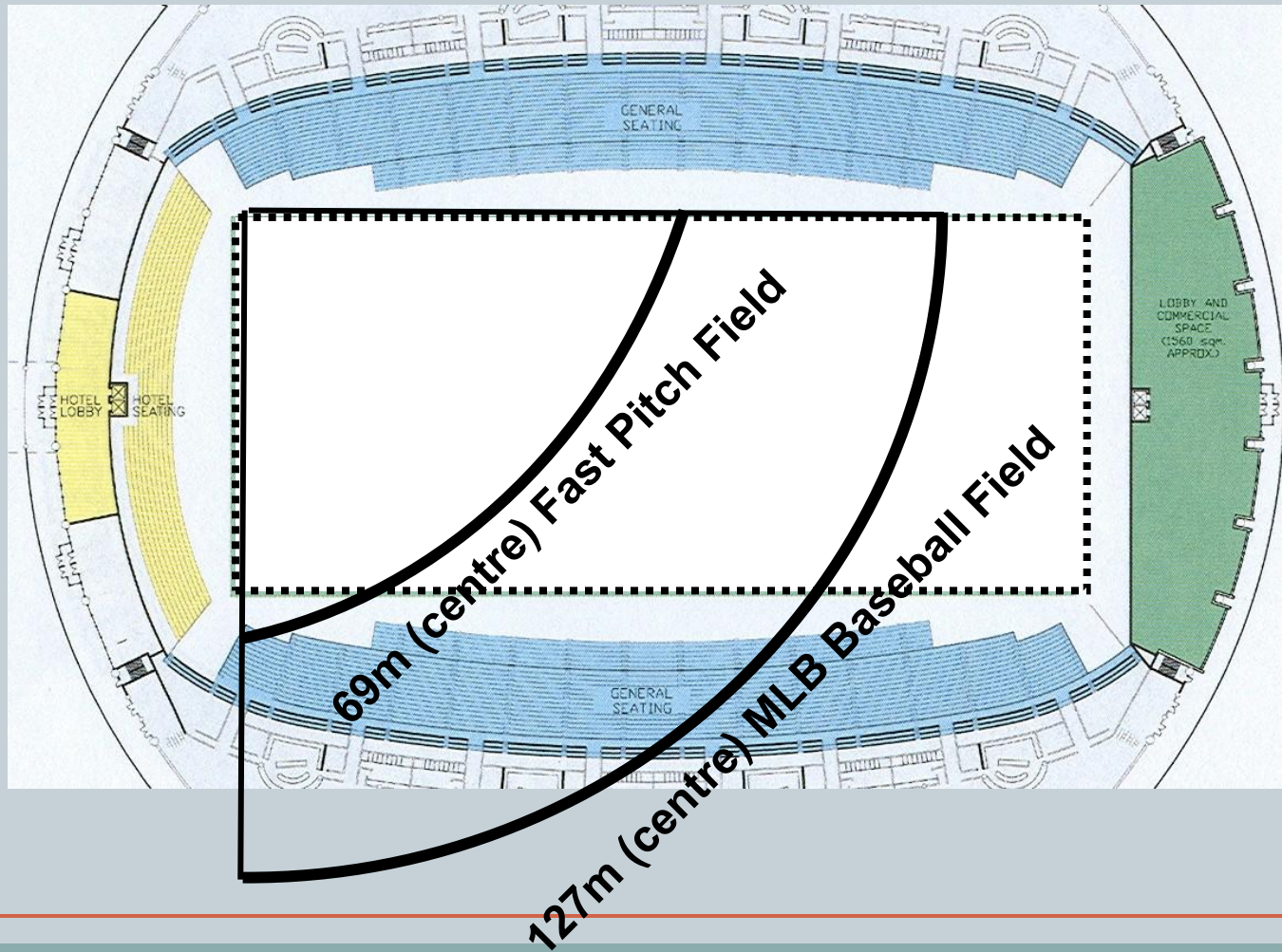
NHL Rink Dimensions (61m x 26m)

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Fast Pitch Softball Dimensions (69m to Outfield)

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A.2 All Weather Example



**PROPOSED COLD ENVIRONMENT ALL-
WEATHER STADIUM (STOCKHOLM)**

\$1.9B to \$2.2B Swedish Krona or \$271 to \$313M construction cost, 3 year construction, completion 2012, sliding roof similar to Phoenix.



**“Proposed” Stockholm Stadium
30,000 Seat All-Weather Stadium**

A.3 Cold Weather Examples



**PROPOSED OPEN AIR COLD WEATHER
STADIUMS (WINNIPEG AND GDANSK)**

\$150M construction cost with land donated by the University.



**“Proposed” Winnipeg Stadium
(30,000 Seat Open Air Stadium)**

\$246M (\$150M Euro)
construction cost over 4
years, completion 2012.



**Baltic Stadium, Gdansk, Poland
(40,000 Seat Open Air Stadium)**