Final Report

Feasibility Study to Assist Site Selection for a Hockey Heritage Museum & Arena in the Windsor, NS Area

November 2, 2017

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Consulting Engineers
EXPERIENCE VISION COMMITMENT

MRA

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November 2, 2017

Nova Scotia Department of Communities,
Culture and Heritage
1741 Brunswick St, 3rd floor
Halifax, NS B3J 3X8

Attn: Marcel McKeough
Culture and Heritage Development

Re: Flextrack Requisition 66640
Feasibility Study - Hockey Heritage Museum and Arena in the Windsor, NS Area

Dear Mr. McKeough,

Please find attached the results of the MRA, and CBCL Engineering, study examining the feasibility of locating a Hockey Heritage Museum and Arena in Windsor, Nova Scotia. The study reports on various marketing and engineering factors that may affect the feasibility of the proposed project relating to the two different site locations and overall project sustainability. Uncertainties remain with each site, and thus there are still undetermined risks.

The report provides a summary section at the beginning, with relevant appendices attached; including, Appendix 1 – MRA Market Study and Appendix 2 – CBCL Engineering Study.

In providing the analyses of the two proposals presented to government, and beyond the scope of this project, it is also recognized there are outside opportunities for the initiative, such as refurbishing existing facilities in the area.

I trust the report meets with your approval.

Yours sincerely,

Robin W. Rodger, MBA, FCMC, President
Market Research Associates Ltd. (MRA)

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1 Executive Summary

Project Overview

The Town of Windsor and the Municipality of West Hants have jointly proposed to build a new hockey museum and arena complex in Windsor on a site called Long Pond, next to King's- Edgehill School (KES), which is credited with being the original location where hockey was first played. An alternative proposal by the Windsor Agricultural Society proposes a similar facility but located on the present Exhibition Grounds.

Overview of Objectives

The Department of Communities, Culture, and Heritage issued a Statement of Work (SOW) to conduct a feasibility study to assist in the site selection for potential investment in a hockey heritage museum and arena to recognize the Windsor area as home to the birthplace of hockey. The government's consideration of investment in this project includes looking at benefits to the local community and the province related to the use of, and employment at the facility, and its ability to draw tourism and host events.

Introduction to Proposals

Based on a standard 17,000 sq. ft. NHL-rink size, the size of both facilities is estimated as approximately 34,000 sq. ft., with about 500 arena seats proposed for the Long Pond site and 600 arena seats for the Exhibition Grounds site (with an option for an additional 200-seats). The ground level in both proposals includes the ice surface (or staging area), dressing rooms, mechanical storage, and water closets, etc. The 2nd level provides the space for the museum and arena seating and includes a 360-degree walking track in both proposals. The remaining space in both proposals is envisioned somewhat differently, but remains fluid in both cases.

A main differentiating feature of the Long Pond proposal is using the walking track, and the arena itself, as a prime museum exhibit area. There is also about 2,700 sq. ft. of separate space available for possible museum/gift shop, concessions, and patio use on the 2nd level. A small canteen space is indicated on both levels. The facility does not designate any space for meetings or a warm room (although the latter may not be needed, depending upon heating/air conditioning design).

The Agricultural Society's proposal is to place a dedicated museum/gift shop in about 3,000 sq. ft. of space on the 2nd level over the entry area; however, final museum specifications are being left to expert input, which could also mean utilizing the walking track for exhibits. There is also 1,000 sq. ft. of warm room/cafeteria area envisioned near the seating stands and a provision about 500 sq. ft. of meeting space. The only allowance for concessions is skate sharpening. The proposal also provides options for long-term leasing of land to reduce up-front capital costs.

SWOT Overview

The SWOT analysis in the next section identifies the major strengths, weaknesses, opportunities and threats of each proposed site. A market study (see Appendix 1) focused on how each proposed site/facility promoting the "birthplace of hockey" will contribute to Nova Scotia's tourism potential with respect to heritage, sports, and hockey interests and other potential revenue streams. An engineering study (see Appendix 2) reviewed the construction issues and associated costs for development at both sites, including required off-site (municipal) upgrades related to traffic and pedestrian concerns.

2 SWOT Analysis

2.1 Long Pond Proposal

Strengths

- Site provides visitors with an authentic experience of the Birthplace of Hockey
- Able to tell a better story on-site and provide visitors with a unique and memorable experience
- Site will be especially appealing to the extreme hockey buff segment (13% of the market – see Appendix 1, Market Report, Section 2.2)
- Museum will substantiate the Long Pond/Windsor/Nova Scotia claim to the Birthplace of Hockey
- Site is presently approved for Windsor / West Hants funding assistance (Reference: personal communication with proponents)
- Location is deemed to have no significant construction encumbrances on the site itself at this point (ref: Engineering Study); possible access threat (see below)

Weaknesses

- Building is costlier than alternative
- Off-site costs estimated at $1.2 million (see Appendix 2, Engineering Report, Page 16)
- Site is primarily accessible only by vehicles (see Appendix 2, Engineering Report, Page 8, "Pedestrian Access")
- Tour buses/vans and others may require food and other services not in immediate area.
- Rezoning required for local commercial development (See Appendix 2, Engineering Study, Page 14)
- Display costs not included (Appendix 3, Sect 1)
- Expected location disadvantage to attract Exhibition site visitors and some skating/ hockey-related users
- Site is appealing to "extreme" hockey fans, but may miss other markets (see Appendix 1, Section 7.2; "Appeal to Broad Markets")
- Walking tour (especially to off-site locations) may not be suitable to all visitors
- No museum rep on Governance Board
- Exhibit placement on the walking track could result in an indefinite revenue stream for museum use and increase costs
- Charging a membership usage fee for walking track/trails may not be practical
- Lacks room for future museum expansion, meeting space, heat room for cold weather

Threats

- Present proposal projected facility cost of $12.7 million for 500+ seat arena/museum is expected to be short of funds in Year 2, requiring fundraising and/or financing
- Fund-raising situation in some doubt - delays and/or extra financing costs can be expected.
- Dill property will maintain ownership of Long Pond "lake" - could affect permission to use. Presently no continuity agreement for long term use.
- Proposal *pro forma* revenue projections of operations are presently not well substantiated (by default, also applies to Exhibition Site proposal)

Opportunities

- Showcases to best advantage the Long Pond/ Windsor/ Nova Scotia claim to the Birthplace of Hockey
- May be the better option to catalyze future development along the Cooperstown Model in encouraging further advance of Windsor's hockey claims (official designations of the Birthplace of Hockey, home of Hall of Fame inductions, home of youth hockey training camps) – (see Appendix 1, Market Report, Section 6.1, ("Preliminary Market Projection…") However, the potential rewards of such a strategy needs to be judged in terms of the financial risk involved.
- One of three highway exits able to direct traffic through the town, increasing business potential

2.2 Agricultural Society Proposal

Strengths	Weaknesses
▪ Site has great visibility and accessibility - potential for greater museum and hockey/skating demand/revenues ▪ The pre-existence of municipal services at the Exhibition site is reflected in Table 3.1 and contributes to overall lower costs ▪ The comparable capital cost of the building and on-site costs is estimated as $900,000 less than at the Long Pond Site (see Table 3.1) ▪ Minor off-site costs (see Table 3.1) ▪ Projected lower building cost will help minimize fund-raising requirements, construction delays, and extra financing costs ▪ Land leasing options, if acceptable, could lower up-front capital costs ▪ Offers 20% more seating at 22% less cost/seat ▪ Site caters to both vehicle/pedestrian traffic (see Engineering Report, Appendix 2, Page 8) ▪ Expected higher museum and ice rental revenues from high traffic area at same or lower costs - more economically sustainable ▪ A confined museum space (versus open walking track) assists admissions revenue collection ▪ Respects museum input – Governance Board ▪ Possible synergies in management and promotion costs /shared staffing ▪ Museum will substantiate Windsor/Nova Scotia claim to the Birthplace of Hockey – would or could include Long Pond by reference and/or transport arrangement / travel plan ▪ The existing arena is planned for other uses after the Town vacates in April, 2018; could potentially act as a back-up arena, but will require use of the Town-owned ice plant	▪ Site has no direct connection to hockey heritage ▪ Construction estimates are not yet firm, but are supported by supplementary evidence ▪ Proposal requests Municipalities to contribute extra funding of $500,000 each (potentially defrayed by lower financing costs) ▪ Lack of site authenticity and distance to Long Pond site may deter some visitors ▪ Proposal is presently lacking *pro forma* projections; analysis adopts Long Pond operating revenue/cost projections ▪ Land purchase option is not readily available if leasing option is not acceptable. (see Section 3.3 herein and Appendix 8) ▪ Expected off-site costs of $75,000 ▪ Display costs not included (Appendix 3, Sect 1) ▪ Space availability for museum, meetings and other uses is at a premium ▪ Building will likely require flood mitigation work at cost of $700,000 (See Appendix 2, Engineering Report, Page 16) ▪ Aesthetics and setting of the Exhibition Grounds site is unappealing to some people, may need to be offset by building placement and extra landscaping cost
Threats	**Opportunities**
▪ Site may be less attractive to major hockey fans who want to experience the actual Birthplace of Hockey at Long Pond ▪ Land purchase costs (if applicable) may be higher than presently assumed (see Table 3.1) ▪ Site is not presently approved for Windsor / West Hants funding assistance (Ref: personal communication) ▪ Exhibition Grounds may require flood mitigation for a new building (Ref: Appendix 2, Engineering Report, "Flood Hazard." Page 9)	▪ The Exhibition Grounds site is appearing as a growth sector in the local economy, with synergies and cross-promotional opportunities ▪ Proven site capacity; estimated 250,000 visitations/year (App 1, Market Rpt, Sect 6.3) ▪ Expected growth in Exhibition site use could assist future museum demand growth ▪ Opens door to greater rural agri-tourism opportunities ▪ Allows incorporation of Long Pond site for potential joint development

2.3 SWOT Notes and Background Information

Museum and Arena Employment

There is not a lot of information forthcoming at present on the actual operation of the facility. As the Market Report notes, museums are generally not high profit centers (see Appendix 1, Section 3.1), especially if they just rely on admission fees. They function mainly as a tourism draw that benefits the larger community. Up to 24% of 1st time pleasure travelers state they are motivated to travel to Nova Scotia for "heritage and culture" reasons (see Appendix 1, Section 6.2, footnote 22).

In Nova Scotia, admission charges for small museums are generally in the range of $5-$6 per adult. Hence, a museum with 5,000 visitors can expect to generate $25,000 per year to $30,000 per year on admissions (see Appendix 1, Section 6.3 for demand projections). Volunteer staff are often utilized. The consultant estimates that paid employment for both the museum and arena operations will total 3-4 personnel at start-up, with a facility manager overseeing both arena and museum operations. The Long Pond proponents state in writing:

> "A Management Board will be struck by the Corporation partners to oversee details (such as who will run the gift shop, take care of the collections, and charge admission). At this stage, (admission) fees are a likelihood, but who collects the revenue and who has the expenses all have yet to be worked through. A facility manager will oversee operations and staff (with a budget of $150,000 as reflected in the *pro forma* statement).

Suitability for Conferences, Ceremonies and Other Events

The study recognizes conference and event potential, but little capability to deliver on these at present (see Section 3.2 herein; and Appendix 1, Market Report, Section 7 "Brand Development and Promotion"). The facilities as described in the respective proposals do not lend themselves to on-site meetings of any great consequence, especially to markets outside of Nova Scotia. There is no meeting space at all presently designated for the Long Pond facility (see layout, Appendix 4) and only a small meeting room at the Exhibition Grounds site (see layout, Appendix 5). This could relate to facility size. The Long Pond Proposal suggests the building size will be 50,000 sq. ft. However, the conceptual projection (in both proposals) suggests to the consultant that the buildings being shown are closer to 34,000. sq. ft. If the buildings are larger, then there should be more space for conference, museum and other uses. A related factor is the limited number of overnight rooms in the area. There may not be near-by space for more than 50 attendees at any one overnight conference at present, and possibly less. There appears to some food and drink catering potential at the Exhibition Grounds site, but none at the Long Pond site.

Traffic Analysis and Parking

The market study does not anticipate museum traffic will exceed more than 50 cars per day in the foreseeable future, but occasionally could reach as high as 400 cars per day for other events. There appears to be ample room to handle overflow at the Exhibition Site, but not at the Long Pond Site, as presently envisioned. Seating would also be a limiting factor at both sites. See Appendix 2, Engineering Report, and Appendix 9, Traffic Capacity and Parking Analysis, for more detailed traffic and parking information.

3 Viability Analysis

3.1 Sustainability

Table 3.1
Overview of Estimated Capital Costs

Site Cost Factor	Long Pond Site 500 seats	Exhibition Grounds Site 600 seats
Land Purchase Cost - 5 acres (net of HST)	$ 185,000	(Assumed) $ 185,000
Land Lease Cost (5 acres)	Option Not Available	Option Available
On-site Servicing Costs (CBCL Estimate)	Included in building cost	$ 700,000
Building Cost + On-site servicing + 15% contingency (net of HST) Ref: Appendix 8	$ 12,055,244	$ 11,155,000
Display Costs (MRA estimated minimum cost not included in proposals)	$ 300,000	$ 300,000
HST Payable - on Land, Building/ On-site Servicing, and Display (HST not rebated is 0.286 * 0.15)	$ 528,271	$ 499,356
Estimated Total Project Cost - All Costs in	$ 13,068,515	$ 12,139,356
Apparent Building Cost Shortfall after Government Contributions ($9 million)	$ 4,068,515	$ 3,139,356
Estimated Cost per Square Foot (34,000 sq. ft. building) - includes Land, Building, On-site Servicing, Display, HST	$ 384	$ 357
Estimated Cost per Square Foot (50,000 sq. ft. building) - includes, Land, Building, On-site Servicing, Display, HST	$ 261	$ 243
Estimated Cost Per Arena Seat	$ 26,137	$ 20,232
Estimated Cost Per Arena Seat for 200 More Seats - Option	Option Not Available	$ 1,250 to $ 2,500
Net Off-site Infrastructure Cost (CBCL)	$ 1,210,000	$ 75,000
Total Building + Net Off-site Costs	$14,278,515	$ 12,214,356

Notes: 1) Cost comparisons include an assumed land price for Exhibition site; actual price may be higher or lower.
2) Both proposals include a 15% contingency fee for building and on-site servicing costs.
3) Exhibit display estimate reference https://museumplanner.org/2011-museum-exhibition-costs/.
4) Exhibition Site proposal includes additional options not shown.
5) **Apparent building cost shortfalls after government contributions are approximately $4.1 million at the Long Pond Site and $3.1 million at the Exhibition Grounds Site (see above).**
6) **Operating costs (not shown) are assumed comparable for both facilities and cost over-runs should be minimized if facilities begin debt-free. Municipalities have also agreed to cover overruns (presently at Long Pond site only). Revenues are primarily related to ice-rentals. The Exhibition Site would be expected to generate marginally higher ice and museum revenues. (Also see Appendix 1, Market Study, Sect 8.)**

The consultant reviewed the sustainability of respective proposals under the following conditions:

- The capital costs of the project and the ability to raise (or fund-raise) these costs,
- The ability to service debt or operating expenses, now and in the future, and,
- The ability to satisfy market demand, now and in the future.

The above three conditions are inter-related. If the facility doesn't meet the market demand, or if the capital expense is such that it can't meet its debt obligations, or if the operating costs are too large, the facility will be financially unsustainable in the longer term. The facility might start off as a sustainable entity, but it must meet market demands sufficiently to cover its debts.

As the new facility is expected to begin operations debt-free, initial financial sustainability is primarily related to fund-raising the start-up capital costs, and funding on-going operating costs. In the case where construction begins before fund-raising is complete, the facility will incur additional financing costs that must be addressed by additional fund-raising, operating surpluses, or both. As museums and arenas are typically not highly profitable, minimizing the initial capital costs, while maximizing demand, are important sustainability considerations within the scope of project objectives (see Table 3.1).

In terms of the present fund-raising potential for the project, it appears that the initial interest shown by many potential sponsors has been dampened by concerns of some members of the public. There is a fear that local tax-payers will inherit "hidden costs" of the facility, and for some, with little to gain. Potential business sponsors must now react to divided community concerns for the project that might affect patron support for their own operations.

Such hidden costs of the project could include 1) financing costs involved with a delayed start-up 2) the costs of improving municipal off-site infrastructure to accommodate either of the proposed sites that could transfer a new burden to taxpayers (unless sponsorship monies can exceed this, there is no benefit to tax-payers) and 3) a concern the facility may not be self-supporting in the longer term and the burden of operating costs will fall on the tax-payer.[1]

Sustainability with respect to community support is divided along the lines of the importance of authenticity/aesthetics of the site/facility to achieve success in attracting new heritage and hockey-related markets that will subsequently attract new business development to the region; versus those who believe that both tourist and local demand will be better served at a proven, successful location.

Underlining the above concerns, the consultant would also note that a new facility, no matter where it is located, needs to be designed to adequately accommodate present and future growth. In this regard, fixed museum space in both proposals is presently relegated to a rather small area (3,000 sq. ft. or less) that will only accommodate about 1,500 sq. ft. of exhibits[2]. There is evidence

[1] For additional information, see analysis of *pro forma* operating projections in the Market Study, Appendix 1
[2] Reference: https://museumplanner.org/

that new museums often attract gift donations in "leaps and bounds"[3] and can quickly grow out of exhibit and storage space. The Windsor museum may eventually desire archive space as well. Moreover, to become a major tourist attraction, space for future growth may be a necessity.

Similarly, there are concerns about of the potential lack of hosting space for the museum-related events, and seating space (currently 500-600) for the arena, as presented in the two proposals. Both these factors could affect future sustainability. The desired seating space for the arena (often mentioned as a minimum of 800 seats) not only serves hockey interests, but other events and potential revenue streams. Neither of the two proposals address these space considerations.

The ability to attract and host events and conferences, in relation to the two proposals, is reviewed in the next section. Other potential spin-off opportunities, and the sustainability of on-going operations, are further examined in the Market Report (Appendix 1 – Section 7 and Section 8, respectively).

3.2 Tourism and Events[4]

Hosting Events and Conferences

On a larger scale, a model example of meeting space demand is presented at the Hockey Hall of Fame and Museum (HHFM) in Toronto, which offers many venues for hosting events of various types: banquets, receptions, and several types/sizes of assemblies (round tables, ½ round tables, boardrooms/meeting rooms, classrooms, and theatre-style class rooms).[5] Each of these types of meetings can entail diverse requirements for standing space, seating space, table space, display space, and the ability to supply food/beverage or catering.

The HHFM 2015 financial statements indicate facility-related sales of $2.9 million amounted to almost 20% of their total income, with a $700,000 surplus (24%), after expenses. In terms of actual meeting space demand, space rental itself only accounted for about 10% of the revenues, with large reception space accounting for about 54% of that and theatre-space of different sizes (with display screens and classroom-like seating) accounting for about 34%. It was the associated services/sales with space rentals that accounted for about 90% of total facility-related revenues; divided between food and beverage (70%) and staging, staffing, security, and merchandise sales/rentals, etc. (30%).

On a smaller, more comparable scale, the Alberta Sports Hall of Fame and Museum (with a separate hockey exhibit gallery) invites corporations and the public to "host their own event[6]" - with reception space that will hold up to 200 people standing, or table space for up to 100. It also has a theatre space that will seat 40 people and a boardroom that will accommodate up to 25.

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[3] See http://www.fih.ch/news/the-hockey-museum-how-it-began/; also, the Cooperstown Museum initially started from a reported huge number of donated artifacts. The Windsor museum will not be a new hockey museum in Canada, but should still attract many gift offers as it becomes more known.

[4] For additional information see Market Report, Appendix 1, Section 7 "Brand Development and Promotion."

[5] See after-hours venues http://www.hhof.com/venuerentals/#venue-rentals and meeting spaces http://www.hhof.com/venuerentals/#meeting-spaces

[6] See http://ashfm.ca/host-your-own-event

(Above) Meeting Spaces at the Alberta Sports Hall of Fame and Museum

The above examples suggest that on-site meeting space rentals, along with food/drink and associated catering of events could be a significant revenue source for the facility, and for local businesses. However, neither of the present proposals offer any type of significant meeting space to facilitate on-site conference and most other event activities.

It is possible that the walking track proposed in both facilities could host receptions. The walking track appears to be about 9-feet wide (± 1 foot) in both proposals. In some cases, the limited width might hinder traffic flow/mix. However, it would likely work for some types of receptions. These are expected to be mostly local (e.g., local hockey-related celebrations, local business gatherings, Xmas, and birthday parties, etc.). These would also likely be limited to after-hours use of the facility, and could be affected by catering needs and climate control requirements (it is possible that walking track use may require air conditioning in the summer and mild heating in the winter, but further information related to this situation is presently unavailable).

The seating and table space required for banquets would seem to rule out the present Long Pond proposal.[7] The proposed 1,000 sq. ft. cafeteria/heating room space in the Exhibition Grounds proposal might allow banquet seating for 50 or more 100 people. Presumably, the cafeteria would be able to handle some catering needs. The Exhibition Grounds also has a licensed kitchen near-by that might be able to service additional catering needs.

Neither facility has dedicated space to host large conferences, although the Exhibition Grounds proposal has designated 500 sq. ft. of meeting/boardroom space.

It has been mentioned that Kings-Edgehill School would be able to host conferences associated with the proposed facility. Whether and how this would work might depend on the circumstances and timing of the conference. The Windsor Super 8 Motel also advertises 2,700 square feet of event space, with 4 meeting rooms that can be arranged to accommodate 120 conference guests or 60 banquet guests. Optimally, it would seem most advantageous to have conference rooms in the museum facility, where they could also capture the greatest revenues associated with merchandise sales, rentals, and other services.

[7] The present Long Pond proposal does have space presently designated for museum, concession and patio space, which might allow replacement for other uses.

Attracting Events and Conferences

The fraternity of present and past hockey players, and their associated organizations, presents a great market opportunity for attracting events and conferences. The attraction to hockey-related conference planners is likely be on par with the attraction of the museum itself; along with associated conference facilities, services, and amenities that are offered. Local volunteers to help organize events and the availability of local hotel/motel accommodations may also play a part.

Native-bred hockey players from Windsor and the region that have moved to other parts of Canada and the world are prime targets for a mail-list and newsletter, particularly if they are still involved with organized hockey at some level. A person managing the facility's website, newsletter, etc., content could potentially manage social media promotion as well to enhance communication synergies. Facebook would be a preferred social media platform for its large reach, content type, and length; but other social media such as Twitter could be of assistance. Website and local advertising could include invitations to "host your own event."

There are roughly 110 hotel/motel rooms available in the immediate Windsor area in summer (about 90 in winter), which might initially constrain large conference activity. Occupancy rate for the region was about 50% for July - Sept, 2016 (and about 25%-30% in winter months) further reducing the number of rooms available for conference bookings. Moreover, the market study suggests that museum demand will increase other visitor traffic by an average of 22 to 33 cars per day in the first 3 years; some of these will be new overnight visitors. However, the number of rooms should increase over time to meet these new demands.

3.3 Site Preparation[8]

Land acquisition considerations including timing and cost

Land costs for the Long Pond site are presented in Table 3.1 and are considered firm at this time. Municipalities have already approved funding for this site, and after formally implementing the intent agreement for a new Municipal Corporation that will oversee the development, land acquisition should be straight-forward. It is possible acquisition time might also be subject to additional agreements with key stakeholders (e.g., access privileges to the Dill family's Long Pond site and/or agreements with the Windsor Hockey Heritage Society and the Dill family concerning museum acquisitions).

Land lease, or purchase, option costs are not readily available for the Exhibition Grounds site. The Agricultural Society is offering to negotiate a long-term lease of land with the Municipal Corporation that it believes will significantly lower land costs. In lieu of a lease agreement, an offer to purchase the land will be subject to an appraised price, and final approval by the Society's Board of Directors. This may take a month or two. Also, both involved municipalities have yet to approve funding for this site; timing unknown.

Compatibility of each site with adjacent land uses. Potential to generate economic activity

The Exhibition site may allow this project development under its current zoning (subject to environmental constraints). The lands surrounding the Exhibition site are zoned appropriately for

[8] For additional information see Appendix 2, Engineering Report

economic development with some immediately adjacent existing businesses, which would likely benefit from development at the site.

The Long Pond site and surrounding areas would require rezoning to facilitate this development and commercial development surrounding the site – the surrounding lands are mostly residential with no significant, formal, business development. The Long Pond site would likely increase vehicular traffic through the town and potentially generate business in the town.

(Research cited in the Market Report suggests that an "ice skating facility" should be located near a major highway system, and whenever possible, be visible from the highway. The more difficult travel is, the less the utilization. Adjacent businesses such as malls, restaurants, hotels, businesses, and schools are both a source of business and can often benefit themselves from the increased traffic. Increased traffic may boost museum visits as well.)

Road Access, Traffic Volumes, Pedestrian Access

The Exhibition Centre site is readily accessible from an existing intersection at Wentworth Road and Cole Road. The Long Pond site is less accessible; upgrades may be required to a number of offsite intersections and to College Road. Upgrades are identified in the main body of the engineering report at intersections which exceed the standard acceptable level of service. The requirement for upgrades are at the discretion of the governing traffic authority. The traffic authority may deem it acceptable to exceed the acceptable level of service during high attendance hockey events as these are not every day events and usually occur outside of standard commute times. The main body of the engineering report has given order of magnitude cost estimates to upgrade the intersections identified with a below standard level of service. Wayfinding signage would be strongly recommended for the Long Pond Site.

The engineering study also notes some of the residential streets surrounding the Long Pond Site (College Road, for example) are narrow with no verge, no lane markings, and pass by many residential properties. There are no sidewalks on these streets and no designated pedestrian crossing areas. These streets are not ideal for high volumes of traffic or large vehicles such as coaches. which would likely travel to the new facility.

Both sites are approximately a 20-minute walk to residential developments of significant density therefore pedestrian access is not considered to be of major importance for local residents to either facility. It should be noted that the Exhibition Centre site is within 7 minutes walk to the Super 8 Hotel. This would be of potential benefit to visitors from out of town. Sidewalks are in place to facilitate pedestrian passage from the Super 8 to the Exhibition Centre site.

Land area required for facility and site (including parking-site circulation) and area available

The Engineering Report illustrates a 5-acre parcel of land showing a building size of 4,752 sq. meters (50,000 sq. ft. or 1.2 acres) and parking space of 7,000 sq. meters (75,000 sq. ft. or 1.73 acres) for 250 vehicles, using 28' aisle clearance. Total land use is approximately 2.9 acres or about 58% of the 5-acre lot. As can be seen from the parking illustration (report, page 9), even though there appears to be a lot of space left for future expansion, this can be somewhat illusionary, depending on parking design and building placement. Note: this layout does not account for coach parking, taxi drop off, service areas, snow clearing or internal traffic circulation.

The Market Report identifies the land use if based on a smaller 34,000 sq. ft. building. In this case, the building would occupy approximately 0.8 acres and about 1.7 acres for parking of 250 vehicles, for a total of about 2.5 acres (or 50% of the 5-acre site). The Market Report recommends a minimum of 200 paved parking spaces be considered for a new facility with 500-seats, and 250 paved spaces for a 600-seat facility.

Presently, the access road proposed for the Long Pond site is believed to directly connect to the parking lot with an easement agreement over privately-owned land. Hence, the access road should not require any space on this 5-acre facility site. Should this change, the access road could constrain available future parking or other space.

As all traffic at the Exhibition Grounds site is presently expected to enter and exit through a major intersection on Wentworth Rd., depending upon final purchase and/or leasing arrangements, an easement agreement for road access over Agricultural Society property may be necessary. This access road should also connect directly to the parking space and not further constrain available space. For additional space/parking information, see Appendix 2, Engineering Report and Appendix 9, Traffic Capacity and Parking Analysis.

Presence and extent of potential encumbrances (e.g. easements, flood plain, wetlands, etc.)

Long Pond – no encumbrances identified at this point. There is a drainage course which should be reviewed from an environmental standpoint if the development proceeds, it is likely that the site can be adjusted to account for any potential setbacks if the drainage course is identified as a wetland.

Exhibition Centre – significant flood plain encumbrance. Potential 1:100-year flood event identified which generates a flood level approximately 3.0m above existing grade.

Natural features that would facilitate construction

Long Pond – Earth works would be required to level site. Not considered to be excessive.

Exhibition Centre – Flat site suited for development, but flood protection for a new building is expected to require mitigation at cost[9]

Municipal Services, Energy Sources, Connectivity, Other

There are no known significant impedances to municipal water, storm or sanitary connection for either site at this time. A slightly greater length of onsite servicing would be required for the Long Pond site compared to the Exhibition Arena Site. It is assumed this has been accounted for in the costs both proponents have submitted.

There are no known issues for 3-phase power/phone/high-speed internet service to either site.

There is no known present or future availability of natural gas to either site. The potential for compressed gas delivered by truck could be explored if desired.

There are no notable differences between sites at this point in terms of suitability with respect to energy saving initiatives (e.g. solar panels, geo-thermal heat, etc.).

[9] Ref: Appendix 2, Engineering Report, "Flood Hazard." Page 9 and Page 16

4 Background on Proposals

4.1 Long Pond Proposal

Key Assumptions

- The need for visitors to experience the whole story of the birthplace of hockey
- Duplicating the economic success of Cooperstown, NY, birthplace of baseball
- Educate the world on Nova Scotia's undisputed role in the creation of hockey
- Establish Windsor and NS as unique, high-quality destination for international hockey fans
- Transform the local economy: develop a destination brand; boost multi-night visits; increase (agri-)tourism; and attract new creative talent for increased business investment and tax revenues

Facility Concept and Operation

- Facility to be located on 5-acre parcel of land north-west of the King's-Edgehill School campus.
- A NHL-sized ice surface and dressing rooms with 500+ capacity seating
- Museum space uniquely designed into the whole building, including walking track
- Final design developed in consultation with Hockey Heritage Society and NS Museum curators
- Admission charges (if any) to be determined by Management Board
- Permission to access actual Long Pond "lake" site presently retained by separate ownership

Project Cost and Funding

- Land cost ($0.80/sq. ft.) of 5 acres is $174,240 before surveying. Final cost is $185,000
- The total project cost is estimated at $12,755,645, net HST (revised 9/18/2017)
- Current cash flow projections showing significant funding shortage, starting Year 2
- Source of funding for any shortage is expected to be fund-raising and debt-financing
- Fund-raising efforts are currently on hold, awaiting final project approval

Governance

- 5-Year Inter-Municipal Agreement to form a Hockey Heritage Municipal Corporation
- Municipalities will cover any operating cost over-runs (presently approved for Long Pond site only)
- Operating board/facility manager to oversee operations/staff - councils retain budget approval
- Board of 8 to include 1 elected, 2 non-elected from each municipality; 1 KES rep and 1 Long Pond Society rep (appointed)

For additional background information on this proposal, see Appendices 3, 4, 6, and 7.

4.2 Agricultural Society Proposal

Key Assumptions

- Goal is to showcase that Windsor/West Hants is the birthplace of hockey
- Exhibition Site is a key location that will be "top of mind" and not hidden
- Existing visitation, highway access/visibility, adjacent amenities, etc. will maximize traffic
- Exhibition site events and attractions growing yearly and will increase future traffic
- Increased spin-offs to local businesses and agri-tourism
- Proposal intends to minimize overall project/infrastructure costs, while boosting museum and arena attendance

Facility Concept and Operation

- Facility expected to be located on 5-acre parcel of land facing Wentworth Rd.
- A NHL-sized ice surface and dressing rooms with 600-seating (optional 800-seating)
- Dedicated museum space at front of building, separated from arena/walking track space
- Museum building facilitates easy access, high visibility, and use when arena is ice free
- Museum size to be determined in consultation with the Hockey Heritage Society
- Includes land purchase options (revised 9/27/2017) or land lease options to lower costs
- Option to purchase O'Brien Building as museum site (includes licenced kitchen)
- Option to link with Long Pond site

Project Cost and Funding

- 600-seat arena/museum – quoted as $8 million to $10 million, ($9 million average; net of HST, land cost)
- Optional 800-seat arena/ museum – quoted as $9.25 million to $9.5 million (net of HST, land cost)
- Optional $1 million recommendation to eliminate fund-raising needs/delays/extra financing costs
- Optional long-term leasing of the land would allow a further reduction of up-front capital costs
- Land purchase subject to placement, appraisal, and final Agricultural Society Board vote (revised 9/27/2017)

Governance

- 5-Year Inter-Municipal Agreement to form a Hockey Heritage Municipal Corporation
- Municipalities will cover any operating cost over-runs (presently approved for Long Pond site only)
- Operating board/facility manager to oversee operations/staff - councils retain budget approval
- Board of 8 to include 1 elected, 2 non-elected from each municipality; 1 Museum rep and 1 Agricultural Society rep (appointed)

For additional background information on this proposal, see Appendices 3, 5, 6, and 7.

APPENDICES

Appendix 1 – MRA Market Study

MRA Market Study

November 2, 2017

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MARKET STUDY OVERVIEW

The Town of Windsor and the Municipality of West Hants have jointly proposed to build a new museum and arena complex in Windsor on a site called Long Pond, next to King's-Edgehill School (KES), that is credited with being the original location where hockey was first played. This site is a 5-10 minute drive from Highway 101, through some residential areas. An alternative proposal by the Windsor Agricultural Society proposes a similar facility, with some additional options, but located on the present Exhibition Grounds. This site is next to Highway 101, accessible via a nearby entrance/exit ramp.

A major inspiration and model for Windsor's Hockey Heritage Centre is Cooperstown, NY, the "birthplace of baseball." In the Cooperstown Model, the development sequence was as follows: 1) major league baseball (MLB) formed a commission in 1907 and decided (without much evidence, and now widely discredited) that baseball originated in Cooperstown. 2) Doubleday Field (the supposed original site of the game) was built in 1920 and was expanded in 1939 to commemorate the 100th anniversary of baseball. 3) Town leaders involved with a major corporate interest (the Clark Organization), also involved with the Historical Society in Cooperstown, incorporated a not-for-profit National Baseball Museum Inc. in 1936. 4) Donations to the museum poured in and 5) MLB suggested the idea of a Hall of Fame to honour players and other builders of the sport - erected in 1939. 6) Later, in the 1990s, youth tournament baseball developed into a huge attraction around Cooperstown.

We can see from the above there is some overlap with Windsor's hockey development. However, the birthplace of baseball did not take off immediately, and happened in several stages:

- An official designation by MLB as the "birthplace of baseball," a brand that over the years has become widely recognized and accepted.
- The development of Doubleday Field as the original site of baseball; used for MLB's "Classic Weekend" and "Induction Weekend" ceremonies; and available to any teams that want to experience playing there at other times for a modest 3-hour rental fee.

- The designation of a special Hall of Fame in the museum to honour baseball's greatest contributors
- A huge collection of exhibits covering every aspect of baseball
- Private sector development of youth baseball tournaments at Cooperstown that drives a significant amount of traffic to their museum.

The researchers compared the present state of development at Cooperstown with Windsor to identify the market match between them. The study found that Windsor currently does not to fully uphold the "Cooperstown Model" in the following respects:

- Windsor does not yet have an official designation as the birthplace of hockey by a professional sports body (such as the NHL). Windsor still has competition in 1) brand name recognition and acceptance and 2) museum exhibit depth and breadth, while Cooperstown has no significant competition[1] in either of these.
- Windsor does not have the official "Hall of Fame" (HOF) connections to the sport, which attract upwards of 10% - 20% of visitors to the Cooperstown area yearly for induction ceremonies (the 20% range is more common when inductees have super-star status).
- Windsor does not have youth tournaments that account for an estimated 20% - 25% of total visitation in Cooperstown. This is a difficult feat to repeat as baseball diamonds are less expensive than arenas, and private sector development in this practice is already somewhat well-established locally in Charlottetown, PE.

This is the current situation that will affect museum demand in Windsor. Identifying where Windsor is now, compared to Cooperstown, helps puts some parameters on the demand for a similar facility in Windsor. This could change over time. The study analyzed the museum and hockey arena components of the study separately, as each has its own intrinsic revenue and expense streams.

Cooperstown has about 400,000 tourists per year, of which about 70% (280,000) are baseball-related. The Cooperstown Tourism Director reports that 70% of their tourists are from New York State (NYS), a market of 20 million people within a 4-hour driving radius.

[1] There are some smaller baseball museums in the US, but they tend to concentrate on a particular player (e.g., Babe Ruth), theme (e.g. ball parks), or era (e.g., Negro leagues).

Assuming 70% of the visitors to Windsor's Hockey Heritage Centre are also in a 4-hour driving radius could provide an important indication of potential market demand.

The researchers used the above information to project the possible size of tourist markets that would seem available to Windsor to develop hockey-related tourism. However, any estimates of museum demand at this point very much depend on how the product (i.e., the museum, the exhibits, and the story of Windsor hockey) is actually developed and promoted.

Residents in Windsor are currently divided on how to take advantage of their hockey heritage. Some believe the best way to approach the opportunity is to develop the site at Long Pond as a museum and an arena that emphasizes the whole experience of the birth of hockey. In this vision, the Hockey Heritage Centre becomes a "shrine" or "mecca" that will (eventually, at least) parallel the Cooperstown experience in attracting tourists to Windsor and the surrounding region. Some say it is Windsor's best hope for substantial economic development.

Other citizens believe that the advantages of Windsor's hockey heritage can be captured at a lower price, and with more benefit to the community. They see the Exhibition Grounds as the rightful place for an arena to serve the community. They believe the same benefits that a Hockey Heritage Centre can capture at Long Pond can be captured at the Exhibition Grounds. Some believe the Exhibit Grounds will generate even more economic stimulus (at least, in the short term) because this location already has a large market that will spend on a museum, and museum users will also spend on local products and services located at, and near, the Exhibition Grounds.

Note:

- The consultants were tasked to inform and clarify various factors concerning the above situation and to conduct a respective SWOT analysis and sustainability analysis concerning each site's proposal. We were not tasked to make recommendations outside the Statement of Work.

1 Introduction

1.1 Background and Rationale for a Windsor Hockey Heritage Museum/Arena

Support for Windsor as the birthplace of hockey goes back many years and is often associated with the writings of Thomas Haliburton that identified students of King's-Edgehill School (KES) playing "hurley" (hockey) on ice on Long Pond in Windsor. There are also other references and associated factors that place Windsor particularly, and Nova Scotia generally, in the forefront of hockey development.[2]

The Windsor site achieved another milestone when a Nova Scotia Sports Heritage Centre (NSSHC) press conference, held at King's-Edgehill School, officially announced that Windsor was the **Birthplace of Canadian Hockey** on October 28,1988.[3] Since then, several more local champions have become involved, including the former Garth Vaughan, researcher and author of the book "The Puck Starts Here," and a founding member of the Windsor Hockey Heritage Museum. This activity also led to the creation of a web site called the birthplaceofhockey.com, featuring Windsor.[4] Over the years, members of the Dill family in Windsor have also been active in promoting Long Pond as the actual site where hockey was first played as noted at gameofhockey.com

In more recent years, numerous sports writers/researchers and renowned hockey athletes have lent their support to the Windsor site as well. While the Windsor evidence has not always been totally accepted by some sports researchers, the claim itself is presently the oldest (i.e., earliest - circa 1800) for the origin of hockey in North America, if not the world.

As recognition and prominence has grown, some observers recognized a potential tourism attraction matching Cooperstown, NY "the Home of Baseball," which draws upwards of 300,000 baseball-related visitors per year. As a result, Windsor officially twinned with the Cooperstown, a small community that has many parallels to Windsor.

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[2] Other early claims, or evidence, of hockey in Nova Scotia include Halifax-Dartmouth and Pictou.
[3] http://www.gameofhockey.com/site-of-hockey.html
[4] Within Windsor itself, there is a dispute about which pond was originally called Long Pond.

After much work and encouragement by local organizations (e.g., Long Pond Society) and public debate, the Town of Windsor and the Municipality of West Hants have (jointly) accepted the challenge to sponsor a proposal to create a Hockey Heritage Museum and Arena (also referred to as a "Hockey Heritage Centre") in the Windsor area.

- adjacent to Long Pond and near King's-Edgehill School (Long Pond Proposal)

A second proposal to build a hockey heritage museum and arena in the Windsor area has also arisen from the Hants County Agricultural Society, with its own champions.

- at the site of the Hants County Exhibition (Exhibition Site Proposal)

Various government and potential funding sources now wish to investigate the relative merits of each proposal and site.

See the following Appendices for additional background information pertaining to both proposals:

Appendix 3 – Supplementary Summary of Both Proposals
Appendix 4 – Conceptual Design of the Long Pond Facility
Appendix 5 – Conceptual Design of the Agricultural Society Facility
Appendix 6 – Governance Model for Both Facilities (see page 1 and page 2)
Appendix 7 – Municipal Agreement (presently applies only to Long Pond Proposal)
Appendix 8 – Land and Building Cost Comparisons
Appendix 9 – Traffic Capacity and Parking Analysis (also see Appendix 2)

2 Analysis of Hockey Markets

2.1 Hockey Arena User Demand Overview

There were 2,450 ice rinks in Canada in 2015, with 213 (8.7%) in Atlantic Canada. New Brunswick had 75 rinks, while Nova Scotia had 65.[5] It is noticeable that more arenas are being built in groups of 2 or even 4 rinks in one place for larger communities. This minimizes ice plant and equipment costs, while maximizing multi-use demand for tournaments, as well as other sports such as curling and sledge hockey. (New arenas may want to take future expansion into consideration.)

Hockey Canada reports there were a total of 636,539 registered hockey players in Canada in the 2015-16 season, up approximately 15% over 10 years (the 2005-06 season).[6] Registered players in BC were up the most over 10 years at 41%, while Alberta was second with 29%. Growth was slowest in New Brunswick and Nova Scotia that have roughly the same number of players they had 10 years ago, but showing a decrease of 13% and 7.3% in the last 2 years, respectively.[7]

Organized hockey leagues at all levels are primary users of arena ice time, as well as potential markets for a hockey museum. Generally speaking, a small hockey arena should expect more than 90% of its revenue from ice rentals. Larger arenas can gain more income from rental space, licensing and food service. Supply and demand can affect ice time rates, but ice time prices are sometimes kept low to maximize public use. Major expenses for a rink include power, payments on building and equipment, salaries and benefits (unionized versus contract) and maintenance costs.

Canada has more than 5,000 full-time jobs in hockey
Source: N O'Reilly (Scotia Bank/Canadian Tire)

[5] ICE HOCKEY IN CANADA – 2015 IMPACT STUDY SUMMARY – Norm O'Reilly, sponsored by Scotia Bank and Canadian Tire
[6] There were also 623,000 registered players in USA Hockey.
[7] Hockey Canada Annual Report 2015-2016 https://az184419.vo.msecnd.net/hockey-canada/Corporate/About/Downloads/2015-16_annual_report_e.pdf

2.2 Hockey Audience Markets Overview

A Forum Research poll in October, 2014 found that 53% of Canadians are NHL Hockey fans; 13% of those are extreme fans who "watch every game and know the stats," while another 19% "watch many games and know all the players." Fifty-two percent of Canadians believe hockey is either extremely important or very important to Canada's cultural and social fabric. See Forum Research Poll Appendix 10.

A 2012 national public opinion survey of Canadians conducted by the Environics Institute, in collaboration with *The Globe and Mail*, found that:

- two-thirds of the adult population follow the game
- one-quarter (24%) said they love hockey and consider themselves "huge fans"
- four in ten (42%) who "watch occasionally"
- one quarter (23%) say they are not really interested,
- one in ten (10%) actively dislike it
- see the complete profile below

Profile of Canadian Hockey Fans

Men (33%) are twice as likely as women (16%) to say they love hockey; women are twice as likely to say they dislike the game (14%, to 7%).

Canadians aged 30 – 49 (31%) make up the largest age group, compared with those under 30 (15%) and over 50 (23%). Over the past two years, fan interest has increased most noticeably in the 30-49 cohort (up 8), and less so among those over 50 (up 4), while declining among those under 30 (down 6).

Across the country, the fan base is largest in BC (33%) and lowest in Quebec (18%; 15% in Montreal), where the decline since 2010 is most noticeable (due perhaps to the Canadiens' disappointing 2011-12 season). Since 2010, hockey's fan base has increased most noticeably in Atlantic Canada and western Canada.

Almost nine in ten agree totally (44%) or somewhat (44%) that *"hockey is a good activity for kids;"* (59% in Atlantic Canada)

NHL playoff hockey (50%) outranks Olympic hockey (27%) by a two-to-one margin (the remaining 23% do not watch either).

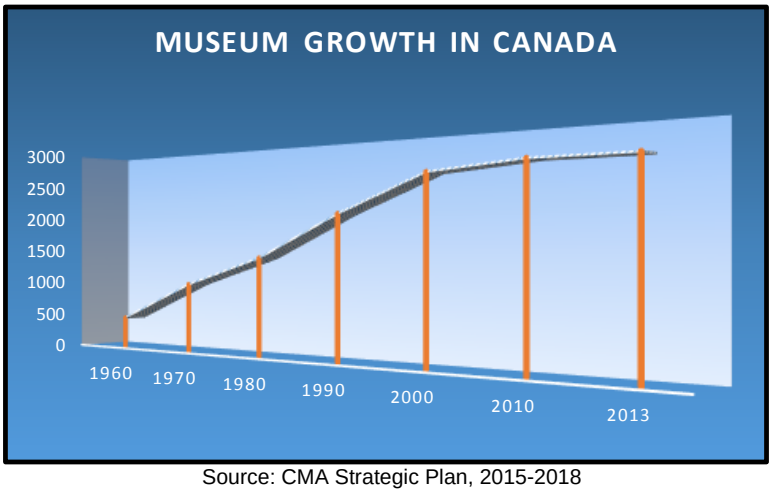
Just over four in ten Canadians agree totally (13%) or somewhat (28%) that *"big hits make watching hockey fun",* versus six in ten who somewhat (25%) or totally (34%) disagree.

Source: Environics Institute, 2012

3 Analysis of Museum Markets

3.1 Museum Demand Factors

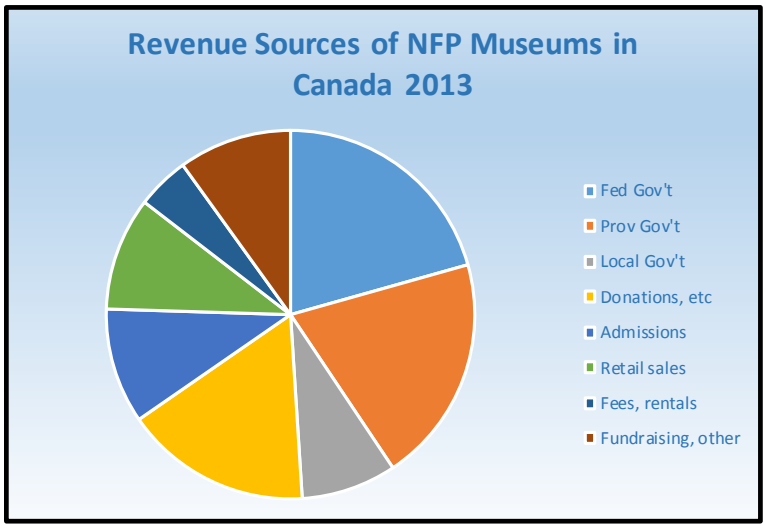
Figure 1 – Museum Growth



Source: CMA Strategic Plan, 2015-2018

Heritage Canada reported approximately 2,600 not-for-profit (NFP) heritage institutions in Canada in 2013 (includes art galleries). There was rapid growth throughout the latter part of the last century that tapered off in the late 1990s as government funding declined.

Figure 2 – Museum Revenue Sources

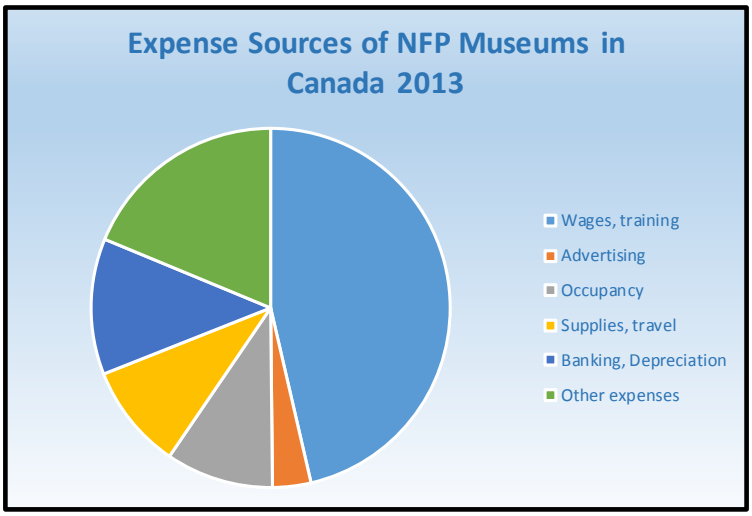


Source: Canada 2016 Catalogue No. CH1-32E-PDF ISS N 2368-500X

Canadian not-for-profit museums depend heavily on government funding, with federal, provincial, and local sources together providing almost 49% of revenues, on average, in 2013. In Nova Scotia, combined revenues from government for 2013 accounted for almost

60% of total revenues of approximately $27.5 million, with provincial and local governments together providing 44.6% of the government total (not shown).

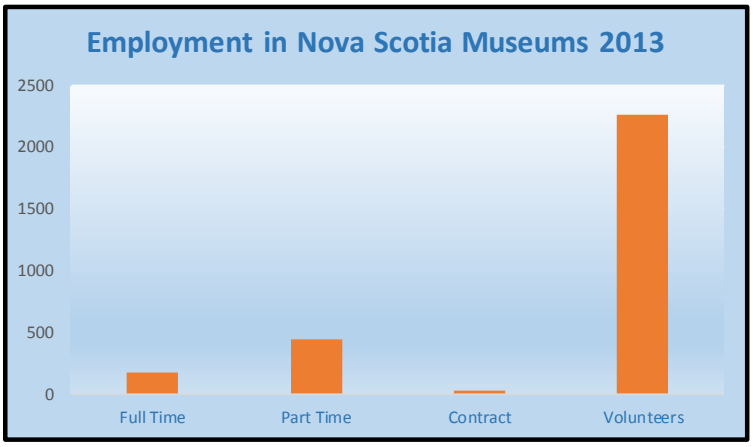
Figure 3 – Museum Expense Sources



Source: Canada 2016 Catalogue No. CH1-32E-PDF ISS N 2368-500X

Expenses for the various types of Canadian museums are quite diverse, but wage-related expenses (including consulting fees) account for almost half (46%). In Nova Scotia, wage-related expenses accounted for about 49% of total expenses of $28.8 million in 2013, while occupancy costs were around 12%.

Figure 4 – Employment in Nova Scotia Museums



Source: Canada 2016 Catalogue No. CH1-32E-PDF ISS N 2368-500X

There were 176 full time employees, and 447 part time workers, in Nova Scotia museums in 2013; suggesting that every $150,000 of revenue will support about 1 fulltime worker and 2.5 part time workers. Each contract worker requires the equivalent of almost $1

million in supporting revenue. There were also almost 2,700 volunteers. A profile of the Canadian Museum Audience is provided below:

Profile of Canadian Museum Audience

80% of all respondents know of a museum in their community, and 48 have visited such an institution in the past year at least once. 38% also say they had regularly visited Museums in other communities in the past year. 62% encourage guests to their community to visit museums as part of sightseeing.

78% of all English-speaking, and 69% of French-speaking, respondents, put Museums on their list of things to see when traveling in Canada or abroad.

68% of respondents see museums as offering both an educational and entertainment/recreational experience, in addition to 15% who see such trips as purely educational, and 9% purely entertainment

92% of all respondents believe it is important for children to be exposed to museums

97% believe museums play a critical role in preserving objects and knowledge of Canada's history

25% of all respondents have used the Internet to "visit" a Museum, with no variance between English- or French-speaking respondents. This resulted in 44% of these individuals actually visiting that Museum.

Source: CMA / Tele Research Inc. 2003

3.2 Sports Museums

The consultants researched the operations of several Sports' Hall of Fame (HOF) Museums and found the smaller ones were generally struggling, or supported by outside entities, including government (e.g., provincial sports halls of fame). These include:

- The Original Hockey Hall of Fame – Kingston, ON
- The Canadian Baseball Hall of Fame and Museum (CBHF) – St. Mary's, ON
- USA Hockey Hall of Fame Museum - Minnesota
- Nova Scotia Sport Hall of Fame

Additional information on the above facilities can be found in Appendix 11. An overview of both large and small sports museums can be found in Table 1 below.

Table 1 – Overview of Key Sports Museums

Overview of Key Sports Museums by Key Budget Factors				
Facility	**Paid Attendance (est. avg./ year)**	**Adult Admission Price / Revenues**	**Gross Revenues All Sources**	**Promotion Budget**
Cooperstown Baseball HOFM	275,000	$23 / (2013) $3 million	$12,829,534	$92,000
Canadian Hockey HOFM	250,000	$18 / (2015) $2.8 million	$14,688,000	$911,000
St Mary's Cdn. Baseball HOFM	3,500	$6 / (2016 est.) $15,000	$350,000 (2016)	small and "in-kind"
Kingston Hockey HOFM	Donations - not recorded (2012) ~1,000	(2012) $4 - $5 / (2012 est.) $4,000	Minimal at present – had $250,000 donation in past	Website and rink presence
US Hockey HOFM	7,000	$8 / (2016 est.) $60,000	"Associated" with USA Hockey	Website
Windsor Hockey Heritage Museum	1,500	$3 - $4 / $8 / (2016 est.) $6,000	Fund raising events "Long Pond Classic"	Website
NS Sports HOF	Exposure to winter hockey audience boosts traffic; est. 60,000 unpaid visits over the year. Sidney Crosby exhibit big draw, also hockey simulator and screened Stanley Cup Playoffs Summer out-of-province audience estimated at 5-10% or 300 to 600 unpaid visits.			
Temporary and Mobile Exhibits	As seen in the Canadian Museum of History current hockey exhibition (which may travel) and the HHF mobile exhibitions – these would impact other competitors to some extent.			

The above table demonstrates the sharp differences in the size of admissions, and the revenues obtained, as well as other key budget factors, between the large and smaller museums. First we will take a closer look at the larger operations; 1) the Cooperstown Model and the Baseball Hall of Fame and Museum, and 2) the Toronto Hockey Hall of Fame and Museum.

3.3 Cooperstown Model

Cooperstown and the Baseball Hall of Fame and Museum (HOFM)

A cornerstone of the proposal to build a Hockey Heritage Centre in Windsor is the example of the village of Cooperstown, NY, that is widely known as the "Birthplace of Baseball" and is home to the Baseball Hall of Fame and Museum (HOF).

Overview of the Village of Cooperstown, Otsego County, New York State (NYS)

Cooperstown, with a reported population of 2,185 in 2016, is located in mid-Otsego County, which is centrally located in NYS, about a four-hour drive from each of New York City (NYC), Buffalo, Boston and Philadelphia. As there is no airport, people drive (or fly/drive, usually from Albany or Syracuse) to Cooperstown. Tour buses account for 20% of the traffic.

Otsego County (2,600 km^2) is about twice the size of West Hants with a population of 60,097 in July, 2016. The population of NYS (20 million) and the bordering states of Pennsylvania, New Jersey, Connecticut, Massachusetts and Vermont, is more than 52 million (US Census, July 2016), all pretty much within an 8 hour drive of Cooperstown.

Tourism View

The Central NY region accounts for 3% of total tourism spending in NYS. Otsego County is one of eight counties in Central NY, and accounts for 9% of the tourism spending in the region, after nearby Oneida County (a large gambling resort area – 64%) and Broome County (especially, City of Binghamton with year-round tourism – 9%). Otsego County (Cooperstown) represents about 0.3% of yearly tourism spending in NYS (i.e., 3%*9%).

Discussion with Otsego County tourist officials indicate that approximately 350,000 to 400,000 visitors are drawn to the County, including Cooperstown, each year. Approximately 70% of the tourism is baseball-related, estimated at 250,000 to 300,000 yearly[8], with the variance largely depending on the attractiveness of new Hall of Fame (HOF) Inductees.

A large part of the attendance is directly related to youth baseball teams (12U) attending training camps near Cooperstown. There are about 100 teams per week over a 13-week period in the summer and each team must have a minimum of 14 players and attendees, resulting in about 20,000 players from all over the US. Each player receives a free pass to the HOF. The players are accompanied by large numbers of family, friends and guests, so the total complement of tournament players and followers is estimated by Cooperstown Tourism at 60,000 to 75,000.

Various local Clark family foundations, originally connected to the Singer Corporation (e.g., sewing machines) donate many $millions to various Cooperstown and Otsego County organizations each year and are involved with several tourist attractions:

- HOF Museum,
- Farming Museum
- Fennimore Museum.

Breweries and wineries in the area are estimated to attract up to 70,000 visitors per year, while the Glimmerglass Festival (opera) has seating for 38,000 per season. A large healthcare community also attracts thousands of visitors per year. The Cooperstown Historic District, the Glimmerglass Historic District, the Middlefield District No. 1 School, the Otsego County Courthouse, and a United States Post Office are listed on the US *National Register of Historic Places*. Boating and hiking and are also active, but more minor attractions.

Baseball View

> "Baseball is the heart and soul of Cooperstown. **The game may not have been invented here**, but the Cooperstown baseball legacy lives in the Hall

[8] Baseball Hall of Fame recorded 260,000 visitors in 2012 - Wall St. Journal
https://www.wsj.com/articles/SB10001424127887323740804578597831168128850

> of Fame, Doubleday Field, and in the baseball fans who descend on Cooperstown to celebrate America's favorite pastime year after year."[9]

Tourism traffic is down from the all-time high of ~400,000 visitors to the HOF in 1989-90. Tourism officials are hoping youth baseball tournaments may re-invigorate numbers in future years. The youth tournaments cater to those seeking athletic scholarships.

There is very little Major League Baseball (MLB) involvement at Cooperstown, outside of the HOF Classic weekend played at Doubleday Field (9,000 seat stadium) in late May (where players tend to be less well-known), and the HOF Induction weekend in July at the Clark Sports Centre. Induction Day tourism can vary from 25,000 to 80,000 (the latter when Cal Ripken, Baltimore Orioles, was inducted), while the HOF Classic has been a much smaller event in recent years. Both events cater to fans seeking autographs.

The Baseball HOF Museum

The HOF Museum is the big draw in Cooperstown, with attendance levels at 250,000 to 300,000 in recent years. The facility features more than 60,000 square feet of exhibit space. A two-year, $20 million renovation of the museum was completed in 2005 and new exhibits are constantly being added. An Otsego tourism official described the Museum as "exceptionally well-done, even if one had little interest in baseball," noting that a short, introductory film "Baseball as America," reflecting the roles of blacks and women, is "very inspiring to many Americans." Trip Advisor also rates the museum highly with 95% of 2,786 reviews rating it "excellent" or "very good."[10]

Doubleday Field

Doubleday field, located in Cooperstown, might be considered as the playfield corresponding to Long Pond "rink," although the first significant competitive game played occurred in 1920, long after (the assumed creator of baseball) Abner Doubleday's time. The field can be now rented by any team for a 3-hour period for about $400 - $500, except for the HOF Classic and Induction Week ceremonies, when it is taken over by the HOF. It is highly booked over the season. It is located about 2 blocks from the HOF museum, although it can't be seen from the HOF building.

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[9] http://www.thisiscooperstown.com/baseball/what-is-the-history-of-baseball

[10] Comments on Trip Advisor indicate some people add this visit to a "bucket list." A national poll indicates that 69% of Americans have a bucket list. http://www.adweek.com/digital/research-traveling-is-on-most-peoples-bucket-list/

Room Availability and Occupancy Rates

There are an estimated 1,200 rooms in the area, but also a large "cottage industry" of private summer homes that are rented out and not tracked. Tourism demand zooms in July and August, but much of the village is shuttered in the wintertime. Several mid-tier hotels in the area require a 5-night minimum stay after youth ball tournaments start, which tightens the availability of rooms for over-night visitors. "Average length of stay is 1-3 nights up to June and past September, but rooms are hard to find in mid-summer and very expensive."

Cooperstown Advertising & Promotion

The Hall of Fame advertising and promotion budget has been in the vicinity of $100,000 in recent years (source: IRA 990 declaration). The County also collects a 2-4% occupancy tax that provides about $500,000 yearly for the Cooperstown area tourism budget. A County website-business partner program generates another $100,000 to $120,000 yearly. The "I love NY" logo program provides "a little money" as does the HOF ($6,500). The Clarke Organization and MLB also do some advertising.

Employment

- 90% seasonal traffic, empty store fronts in winter
- HOF 50-60 FT employees in winter, another 30-40 in summer (intern program)
- Standard souvenir items, T-shirts, "you can find anywhere"
- HOF has gift shop but no restaurant (to allow the town that business)
- Some HOF catered events provide short term employment
- One major product - baseball bats made in Cooperstown are highly regarded nationally
- Total visitor-related spending in Otsego County of $192 million in 2016 is estimated to support 2,380 direct jobs ($80,000 per job) and 3,395 direct, indirect, and induced jobs in the County (source: Tourism Economics); it is assumed that 70% is related to baseball.

Competition

The Baseball hall HOF museum is unique – there is no real competition anywhere else.

The Soccer Hall of Fame (1999- 2009)

Cooperstown officials note that, following Cooperstown's lead, the Soccer Hall of Fame setup a $7 million museum and initiated a summer soccer camp project in nearby

Oneonta, NY in 1999, but the operation and museum failed after 10 years. A new facility and museum is now planned in Texas for 2018.

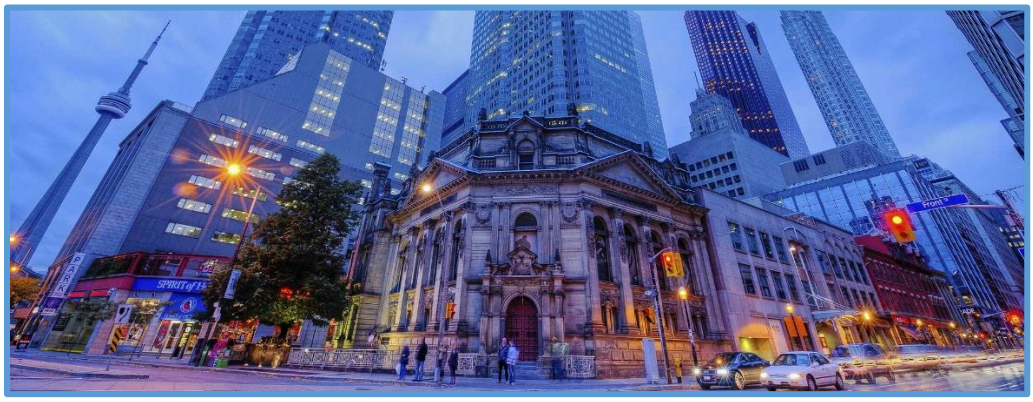
Table 2 – Comparison of Windsor to Cooperstown

Comparison of Windsor to Cooperstown		
Visitation Factor	**Cooperstown**	**Windsor**
Market Size – 1 day (8 hr) drive	Large – est. 40+ million	Small – est. 2 million
Present visitation – 20-mi radius	400,000 (~70% baseball)	Occupancy rate too small to report (TourismNS)
Youth sport programs (12U)	Est. 40 baseball fields (used continuously during the day)	1 arena
Museum/Exhibit Size	Large - 60,000 sq. Ft.	Small est. 3,000 sq. ft.
Breadth of museum exhibits	Relatively large	Relatively small
Depth of museum exhibits	Relatively large	Relatively small (favours regional history)
Star Power of Exhibits	Relatively large	Relatively small
Induction Ceremonies	Yes	No
Distance of Exhibits to historic site	Doubleday Field nearby	Long Pond nearby
Surrounding Attractions	Large resort area	Some resorts
Competitive Facilities/Locations	None	Some (TO, Montreal, Kingston)
Advertising and Promotion	High (BHF - $92,000)	Presumed Low

Additional information on the Baseball Hall of Fame Museum can be found in Appendix 12.

3.4 Hockey Hall of Fame Model

Hockey Hall of Fame and Museum (HHOFM) – Toronto, ON



The Hockey Hall of Fame and Museum (HHOFM) is often considered the equivalent of the Baseball Hall of Fame and Museum for the sport of hockey, except it doesn't claim Toronto to be the birthplace of hockey. Also, although It has the same exhibit space size as the Baseball HOF, it is criticized for allowing exhibit sponsors to advertise within displays. Some visitors are also put-off by the somewhat "odd entranceway" from a food mall inside the building. Nevertheless, it achieves fairly good ratings at Trip Advisor, with 90% of 3,059 reviews rating it "excellent" or "very good." It might be considered both a model for, and a potential competitor to, Windsor.

The HHOFM is located at the corner of Yonge and Front St., in downtown Toronto, across from Union Station - often considered as Canada's busiest transport hub. The facility attracted 200,000 paid visitors in 2015. It is a not-for-profit organization with 60,000 sq. ft. of exhibit space. The facility cost $27 million (1993) and conducted a $12 million exhibit renovations project between 2000-2006.

The HHOFM considers itself the principal facility for research into the history of hockey and has a goal to "collect, preserve, research, exhibit and promote all those objects, images and histories which are determined to be significant to the story of ice hockey in Canada, and throughout the world."

The facility maintains close connections with the NHL and is a partner in the nearby Seaman Hockey Resource Centre. Major sponsors include ESSO, Scotiabank, Honda, Via Rail, Tim Hortons, TSN). It is presently rated as #11 of 500 Toronto attractions by Trip Advisor.

The HHOFM reports a 2015 revenue base of approximately $15 million, before expenses and overhead. The $15 million is accounted for by retail sales (25%), meetings & event hosting sales (20%), admission fees (19%), licensing (18%), sponsorships (10%), induction & miscellaneous (7%). Revenues, net of direct expenses, are ~$8.2 million, with admission fees accounting for almost 35% of that total. Various overhead costs, including staffing, promotion and building costs (amortization) total approximately $7.5 million, leaving a surplus of ~$750,000 in 2015.

Additional information on the Hockey HOFM can be found in Appendix 12.

4 Comparable Museum Market Demand Analysis

4.1 Current Market Demand Bench Mark at Windsor

1) Windsor Hockey Heritage Museum, Haliburton House

Advertising and Promotion to date:

- Original declaration of birthplace of hockey in Canada (1988)
- Twinning with Cooperstown - birthplace of baseball (1996)
- Occasional news broadcasts (including CBC national on-site 2002)
- Many newspaper articles
- Book – "The Puck Starts Here"
- Social media – Facebook
- Small mentions on the Nova Scotia Museum website
- Other "home" website advertising (2)
- Various sports writer endorsements
- On-site appearances by many hockey players and personalities such as Brad Park, Guy LaFleur, and Don Cherry (but Cherry may not endorse Windsor's claim)
- Highway sign
- Sports Illustrated (2015) "Seven Wonders of the Hockey World: Places a fan must visit" - Long Pond was #6
- Annual Long Pond Classic that has attracted major NHL players over the years
- 80,000 Town of Windsor brochures

Result: 1,400 paid attendance estimated by the museum site manager for June to September, 2016 (present **actual market demand**)

4.2 Market Demand at Comparable Facilities

1) The International Hockey Hall of Fame and Museum (Kingston, ON)

This facility is very comparable to the proposed Windsor facility in terms of breadth and depth of artifacts, as well as a claim to the birthplace of hockey (according to management). However, it also operates in a much larger population centre. Also known as "The Original Hockey Hall of Fame," this facility traces its roots to the mid-1940s and finally opened in 1965 in Kingston. In 2013, it moved to the Invista Centre, a brand-new four-pad arena facility. In February 2016, it unveiled new exhibits, including a theatre and a new Kingston hockey film titled "The Cradle of Hockey," narrated by Don Cherry. The facility operates unmanned and is open from Thursday to Sunday, noon to 6pm, admission by donation.

Result: Best paid attendance was about 1,000 (**actual demand**) in a former location – management is suggesting that their new rink location will have better attendance, but no records are being kept (unmanned / short hours) and visitor donations are presently "very small."

2) The Canadian Baseball Hall of Fame and Museum (St. Marys, ON)

This museum is of a relatively comparable size as the present hockey heritage centre in Windsor Haliburton House and, likewise, is presently located in a historic house in a rural area of Ontario. It was originally located in Toronto in the mid-1980s, but moved to St. Marys in 1994.

Result: Paid admissions are generally in the range of 3,000 to 4,000 (**actual demand**), 80% from Toronto, with few visitors from out of province.

3) US Hockey Hall of Fame Museum (Eveleth, Minnesota)

This museum, located in an out-of-way town, has a long history (1973), but struggled to survive in later years and was reorganized in 2007, after a 6-month closure. It champions USA bred hockey players in a population of registered hockey players that now matches the hockey player population in Canada (~630,000). It has a 3-floor exhibit of many unique artifacts and displays that focus on Hall of Fame players (a known big draw).

Result: Paid admissions are estimated at 7,000 to 8000 (**actual demand**) in 2016, (down from all-time highs of 21,000 in 1973 and 19,000 in 1981 (after the US won the World Hockey championship with Russia.)

4) The Nova Scotia Sports Hall of Fame – Hockey and Sidney Crosby Exhibits

Sidney Crosby is a big draw, and the NSSHF offers an interesting and free, if somewhat small, exhibit in central downtown Halifax. There is no record of attendance, but officials estimate the facility draws an estimated 60,000 visitors per year. Most of these are tied to winter sporting and other events at Scotia Centre. Local traffic has apparently dropped since early spring and visitation by non-Nova Scotians appears to be highly related to cruise ship and tour bus schedules. Since most cruise ships arrive in September-October (75% in 2017), the facility is somewhat slow right now.

Result: The consultant would place a "rough estimate" of visitor traffic (including from Halifax) at about 15,000 for the 6 months April to September inclusive, with 10% of that being out-of-Province. Winter traffic is higher, but likely mostly local, except for cruise ships in September-October, which would seem able to deliver some out-of-province visitors. If admission was charged, it is quite likely overall attendance would be far lower.

5 Windsor Museum and Arena Markets Analysis

5.1 Windsor Museum Demand Analysis

Market Size

Windsor is drawing from a relatively small population compared to many competitors, especially Cooperstown. The sheer amount of vehicle traffic generates a huge volume of travel spending throughout Central New York State. Travel expenditures don't particularly stand out in the Cooperstown area, over 9 other close-by counties.

Competition

It is generally recognized that Windsor has the oldest claim to the birthplace of hockey in Canada (circa 1800). Although it is outside of the mandate of this study to review the various past and present claims to the birthplace of hockey, it should be noted that other areas have claimed significant positions in the development of hockey in Canada.[11] Whether these claims have any basis in fact, they do tend to confuse the issue and diminish audience potential, at least in the short term.

Market Development and Promotion

Large museums such as the Baseball HOF (Cooperstown) and the Hockey HOF (Toronto) have major affiliations with MLB and the NHL – and longstanding recognition. This includes "Induction Days" ceremonies that generate major audiences (and signature hunters) and can account for up to 20% of total museum visitors. More than 100 youth baseball training camps also bring a huge audience to Cooperstown, with estimates of 20% - 30% of total HOF yearly visitation. Hence, it can be expected it will take some time for a smaller museum to build major markets.

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[11] Montreal claim
http://www.iihf.com/home-of-hockey/news/news-singleview/?tx_ttnews%5Btt_news%5D=6417&cHash=87284bbd768eb133ea94a6cad00591d0)
Kingston Claim
http://www.cbc.ca/news/canada/ottawa/kingston-windsor-hockey-birthplace-1.3392158
Halifax claim
http://www.hockeyshome.ns.ca/birth.htm
English Claim
http://nationalpost.com/sports/hockey/nhl/why-hockey-isnt-really-our-game-canadas-national-sport-was-born-on-the-frozen-ponds-of-england-book-reveals/wcm/fe6343fe-5852-4153-8806-9833910f7f0e

5.2 Windsor Arena Demand Analysis

Windsor arena recommendations provided by a current hockey coach, with attached comments by the consultant and other Windsor hockey-related personnel

1) **Size of arena** - NHL size would be appropriate. Some people comment that Olympic ice is necessary but that would not be required in our area, as the sizing is not comparable to anything else that our kids would skate on now, or in the future for that matter.

2) **Size of seating** - having the capacity to hold 1,000 people at least (this does not necessarily mean seats), since some of our levels, including the one I coach (Jr B), can get as many as 750-1000 people during the playoffs. It is also important that we have the capacity for events such as high school tournaments, Jr playoffs and potentially provincials for all levels of play. This is not limited to just hockey, could be for figure skating, concerts, and other stages that require space for larger crowds. which we do not have in this area currently. **Comment: 3 other hockey-involved personnel recommend minimum 800-1,000 seating; one person formerly involved in organized hockey thought that 500-seating capacity was sufficient.**

3) **Cafeteria** - there is not a real need for a cafeteria in this venue - that is, if the arena was near the highway where the majority of fast food locations are in our town. There should be a spot to have a temporary canteen should the need ever arise to host a concert (if you needed it for things like beer sales), or at least if a hospitality room or area needed some sort of setup - should be considered for this but I don't think it needs to be a full fledge canteen area.

4) **Ice time availability and arrangement?** - Minor hockey usually gets a lot of the prime ice times with recreational hockey filling in around these times. Should school hockey or other ice time renters be looking to have extra ice I am sure it would be available as the ice is always available between morning and mid-afternoon during the week. When I attended KES growing up we always had our ice at 3pm every day during the week, which didn't affect anyone and we were done prior to minor hockey, or the other local school needed the ice, which I found worked out really well.

5) **Ice time charges** - ice time fees have to be set so that the operational costs of the facility can be met each year. Currently we do not have the ice time fees that some of the city arenas may face, but we need to stay in line with the costs to operate such a facility, along with whatever sponsorships are added, etc.

6) **Location** - I believe it should be near the existing arena, which is easy to find off the 101 hwy, and easily accessible via a roundabout and has lights to control various levels of traffic when required.

I have nothing against King's-Edgehill School, considering all of my family, as well as my son, has attended this school - it has more to do with what I feel is right for everyone in the community, which includes the tax payers that would have to foot any additional costs for civil work to grounds or roadways - based on my many days traveling to school on College road, it was not always the easiest on vehicles and if it is not made wider and have some sort of traffic control at the end it will not be an easy feat to get to and from

that location, without many upgrades. The location behind KES also distances the arena / museum and its visitors from the local businesses that surround the current location - this being gas stations, hotel accommodations, Tim Hortons, McDonalds, etc.

7) **Parking** - must be suitable to meet the arena capacity. Currently there is not quite enough parking space at the present arena (**Comment: 125 paved spaces, plus other parking in the area**), but if it was in the area adjacent there is ample parking in front and behind in the fields that would be more than the facility would require.

8) **Access** - the current area where the arena is now is easily accessed for all levels of traffic and that is proven during times of horse shows, exhibitions and even now during our playoff hockey games. We have quick access to the highway, and already have a set of lights to help guide traffic smoothly.

9) **Ice plant?** - I am in the refrigeration business and I know several people that look after many of the arenas nationwide. New technology of refrigerants and efficiencies in operation, including heat recoveries, could be realized no matter where the location is, and I believe this would be a good fit for this type of project. One question would be if another ice surface was required would the facility be built to be easily added to or would there be a way to add on to the same ice plant at a later date if that need ever arose? Sizing of the proper equipment from dehumidifiers down to the smallest detail is important.

10) **Recommended improvements?** Being part of the junior hockey team that does have our own dressing room in the current arena - I would want to see that be part of the plans, but also have enough storage or shared rooms for other high profile groups like the high school teams as well if it was possible. Naming rights is a great way to raise money for the arena. I believe a lot of the other items were covered such as a warm room for everyone, walking track, etc. **Comment: There is a potential sponsor also reportedly requesting a named dressing room.**

11) **Comments on a hockey museum within or attached to the facility**? - I think the concept is a good idea and what better place to house this type of thing. Look at the sport hall of fame inside the Scotiabank Centre now, many people walk thru there now just as they are waiting to watch an event - and that would most likely prove to be the same if it was added to the new arena.

12) **Youth Tournament Hockey** - **Can you see 6 teams per week for 13 weeks (78 teams in all), coming in from all over the Maritimes/Canada to play youth tournament hockey in the summer?** - that is a tough question. I would have to see what the plan is but I have not seen that done before and I think it would some serious time to develop. (Added) I am not sure the youth hockey would fly as that has less to do with the arena and more to do with the people running the camps etc. **Comment: this type of tournament hockey would parallel Cooperstown**

13) **Hockey schools?** I have actually done hockey schools myself and I feel there could be more done along this front. I ran it out of Brooklyn several years ago and it worked out pretty good. There are some other guys doing things as well, but with a proper facility here that is open longer or earlier into the summer season, we could draw away from guys having to go to Acadia, etc. for these types of events and do them

locally. (Added) If we had a decent arena in the proper location it could be developed for sure, and I know for a fact that we would look at holding our own camps to raise money for our club and would make great use of the arena in the off season. **Comment: July and August are usually report as low demand times for ice use. Even from May on.**

Table 3 – Comparative Factors in Arena Location

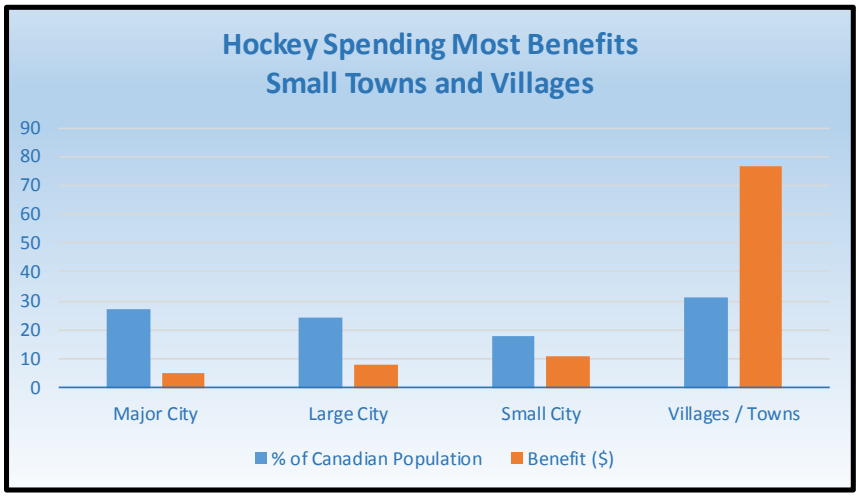
Some Comparative Factors in Arena Location		
Desired Attributes	**Long Pond**	**Exhibition Grounds**
Birthplace of Hockey	Yes	No – but not far away
Ease of Access	No	Yes
Ample Parking (room to expand)	Unknown	Yes
NHL size Arena	Yes	Yes
Minimum 800 -1,000 seats	Not planned	Recommended
Nearby Food / Lodging / Shopping	No	Yes
Existing high traffic/tourist area	No	Yes
Potential for Hockey Schools	Yes	Yes

Arena Direct Employment

"A rink manager is the key to a successful operation. In addition, a facility (with 400 seats and an allowance for 300 more mezzanine seats) operating an NHL-sized rink for 18 hours per day will have one assistant manager and three to five additional part time employees who can drive the Zamboni and maintain the building. This is consistent with the practice of other rinks in the area." (abstract from the Palouse Ice Rink Business Plan) **Comment: This labour level is compatible with other reports, except that the Windsor arena is more likely to operate on a 12-14 hour day.**

Potential Economic Benefit

Figure 5 – Hockey Economic Impact on Small Towns



Source: Norm O'Reilly (Scotia Bank / Canadian Tire)

Small towns and villages are found to benefit from hockey spending disproportionately to their size. While small communities only account for 31% of the population, they receive 77% of direct hockey-related economic impacts. <u>However, where small populations do not support hockey, they are actually driving economic benefits out of the region as players, audiences, and supporting businesses move to new venues and the money is spent there.</u>

In Nova Scotia, the 6 starting level populations from Initiation (under 7 years old) to Midget (under 18) are all pretty constant with about 2,600 to 2,700 registrants, suggesting little growth in minor hockey over the next 10 years.

Potential to attract hockey interests for professional endeavours

Cooperstown Tourism reports that professional MLB players have scheduling conflicts and no desire to play in Cooperstown. Some retired players show up for "Cooperstown Classic" one weekend per year. The consultant believes the same would likely be true at Windsor.

Moreover, to attract larger tournaments of any kind would suggest a need for large audience capacity. For example, Yarmouth's Mariners Centre, with ~1,300 seats (for main arena) and 1,780 for concerts, hosted both the 2012 and the 2013 World Junior A Hockey Cup Challenge. Liverpool, with a 1,050-seat arena, will host the 2019 World Junior Curling Championship for the 2nd time, broadcast by TSN.

6 Market Demand Projections

6.1 Projection 1 – Population and Other Demand Factors

At this point in the investigation, the researcher suggests two factors that may affect the attraction of significant new tourism markets to a Hockey Heritage Centre in Windsor and require further examination.

1. the Windsor "Birthplace of Hockey" brand needs to be widely recognized and accepted, and

2. Exhibits at the new museum should appeal to a broad range of markets (e.g., younger fans are attracted to star players; kids look for games; the older generation remember stars of their youth, etc.)

It is not yet known how widely the Windsor brand is recognized and accepted. Moreover, an exclusive heritage focus in the Windsor museum, while attracting some markets, may lose others because of lack of attractions. Since many visitors travel in groups and/or family parties, either or both the location and the exhibits should include elements that cater to children and/or people that may not be specific hockey enthusiasts, but can appreciate the surrounding heritage and cultural factors. The most successful museums have many stories to tell. This may not be Windsor's focus, but it is something to consider if a large audience is desired.

Breadth of exhibits would include 1) covering all historical periods of hockey [i.e., i) 1800s, ii) early 20th century (growth stage), and iii) current – especially star players], 2) covering all potential interest groups [e.g., families/children, non-enthusiasts] with such diverse presentations as i) multiple hockey display themes; ii) cultural interests, including black and women's hockey; and iii) interactive games for both kids/adults, and 3) generally including a movie or video story on the subject(s) exhibited. Depth refers to the amount of exhibits for each display subject.

In determining market size, both of the above attraction factors are modified by 1) the existing competition, and 2) marketing and promotion, among other factors (such as market size, admission prices, convenience, etc.). We will examine some major competitive factors more closely in the following table.

Table 4 – Competitive Factors in Comparable Sports Museums

Competitive Factors in Comparable Sports Museums		
Museum	**Special Place / Unique Claim**	**Unique Exhibits (depth/breadth*)**
Kingston, IHHOFM	(Unofficial) Birthplace of hockey; Cradle of hockey	Depth and breadth of exhibits is judged quite competitive to Windsor potential.
US Hockey HOFM	(Unofficial) Birthplace of American hockey - Focus on US players	Depth and breadth of exhibits is judged quite attractive to US hockey buffs; no US competition.
Canadian Baseball HOFM	Has claim to being near the Birthplace of Baseball in NA – Beachville, ON	Exhibits feature Canadian MLB players and TO Blue Jays' stars, but museum has many other artifacts/ trophies.

Before going further, let's take a look at two large sport museums that are achieving great success and what factors might be involved. Both the following operations generate 200,000 to 300,000 paid attendance yearly.

Table 5 – Competitive Factors in Comparable Sports Museums

Key Factors Affecting Attendance at Major Sports Museums		
Competitive Factor	**Baseball HOF / Museum Cooperstown, NY**	**Hockey HOF / Museum Toronto, ON**
Special Place / Unique Claim	Birthplace / home of baseball "Mecca" of baseball No competition to speak of	Largest hockey museum Some limited competition
Exhibits - depth/ breadth	Large - 60,000 sq. ft. of exhibits Mobile exhibits Limited competition Visitor ratings near excellent	Large - 60,000 sq. ft. of exhibits Mobile exhibits Limited competition Visitor ratings quite good
Promotion Support	Budget ~ $100,000 Clark Foundation /Town Ads Access to Media - local/national	Budget ~$ 900,000 Access to Media - local/national
Organized Baseball Support	MLB support of HOF/inductions Youth tournament support	NHL support of HOF/inductions
Market Size (near-by)	Very large – 40+ million	Large – 20+ million

Market demand assumes that a product is paid for. The above factors deal with many of the major market research variables that affect successful outcomes, except price. In the case of Windsor, we are assuming the price is inconsequential since if travelers to Nova

Scotia can afford the price of travel (to visit the Birthplace of Hockey), they will certainly pay a small admission fee. This would be true for in-province visitors as well. Price is not considered relevant except that some payment must be made to guarantee legitimate demand.

Market Projection 1

Cooperstown Model Match

Cooperstown Baseball Hall of Fame and Museum (BHOFM)

- has no similar competition
- 60,000 sq. ft. of exhibit space
- $ multi-million displays
- well-known reputation – long history / media presence
- major baseball tournament centre – supplies free tickets as part of package
- induction day ceremonies are big draw
- backed by MLB and major sponsors
- located in a large population centre (significant more travelling public)

Result: 250,000 – 300,000 (average 280,000) visits to HOF Museum in 2016 (**present actual market demand**).

(Based on the above) A Preliminary Market Projection for Windsor:

About 50% of all travel to Nova Scotia originates in Atlantic Canada, (and another 25% from Ontario).[12] In comparison to Windsor, the market population ratio in the same driving radius of Cooperstown is at least 20:1 (40 million/2 million population), which might suggest (all other factors being equal) that visitation to Windsor could be in the range of 14,000 (i.e. 280,000 visits/20) based on the available market.

USA Baseball, that manages organized baseball in the US, reports that there are more than 12 million amateur baseball players.[13] This compares to approximately 600,000 Canadians registered in organized amateur hockey.[14] Again we see a population ratio of 20:1 (12 million/600,000), suggesting that there is 20 times the market of baseball fans available for visitation to Cooperstown than hockey fans available to Windsor. This seems to cap the available market to Windsor at 14,000 visitors, <u>but this market has to be</u>

[12] Tourism Nova Scotia – Visitors by Origin
[13] http://web.usabaseball.com/about/
[14] https://az184419.vo.msecnd.net/hockey-canada/Corporate/About/Downloads/2015-16_annual_report_e.pdf

actualized, and we are assuming the Cooperstown model can be further fulfilled in Windsor.[15]

Several significant factors have still been left out of the preliminary analysis that could modify the above projection, including:

1) What is the present marketability of the Windsor "Birthplace of Hockey" brand?
2) How competitive are the Windsor museum exhibits all hockey fans?
3) What tournament markets will Windsor have (similar to Cooperstown)?
4) How well will Windsor's museum be promoted?

Potential Attraction of the "Birthplace of Hockey" brand

The consultant believes this question may require a national or regional survey, or focus groups, to more accurately determine the answer. However, there is some evidence the brand may not be a significant attraction at the present time.

First of all, there is existing competition for the "Birthplace of Hockey" in Canada from several communities[16], but particularly Kingston, Ontario[17]. This "muddies the waters." Mark Potter, President of the Original Hockey Hall of Fame in Kingston (admittedly, not an unbiased source) believes that Kingston's claim is stronger than Windsor's; however, local politics has not backed the claim because of other priorities (e.g., Canada's first Capital). While giving Nova Scotia due respect for the development of the game (e.g., "Halifax Rules") Potter thinks that many Upper Canadians would favour Kingston, or Montreal, as the logical birthplace of hockey in Canada. "Ontario knows little of the Windsor claim and I am aware Nova Scotia knows little of the Kingston claim. However, I do think any hockey fan visiting Nova Scotia would have an interest in the Windsor claim and seeing the museum. It's all about marketing."

We also know that the "Birthplace of Baseball" is not a significant factor in the present success of Cooperstown. Most researches agree that baseball was not created in Cooperstown and the Baseball HOF has admitted it in a press release (also see the "Doubleday Myth"[18]). Cooperstown officials also basically admit this on their website ("The game may not have been invented here."[19]).

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[15] Most of the Windsor market would likely be accounted for by visitors from Nova Scotia and New Brunswick; with a small percentage from PEI, Maine, and Quebec.
[16] See "Origins of Hockey" https://www.amazon.ca/Origin-Hockey-Carl-Gid%C3%A9n/dp/0993799809
[17] See http://www.cbc.ca/news/canada/ottawa/kingston-windsor-hockey-birthplace-1.3392158
[18] See https://en.wikipedia.org/wiki/Doubleday_myth
[19] http://www.thisiscooperstown.com/baseball/what-is-the-history-of-baseball

Before it was questioned, the myth seems to have had some enduring impact in the early decades of baseball's development in Cooperstown; especially in bringing the Baseball HOF to Cooperstown and in developing "Doubleday Field" into legendary significance. In terms of all things baseball, there now is no significant competition in the US for what Cooperstown offers. This situation is different for hockey in Canada, with many competitive museums and exhibits.

Although disputed at the present time (but difficult to disprove), Windsor does have what is generally recognized as the earliest known claim for the birthplace of hockey in North America (at least). Windsor's strength is that it has taken substantial possession of the "Birthplace of Hockey" claim. The claim is now backed by extensive records of hockey (or "hurley") activity throughout Nova Scotia in the early part of the 1800s, national and international news reports, hockey events, present day websites, highway signs and other proclamations from significant authorities.

Long Pond as the original site of the game, is somewhat comparable to Doubleday Field in Cooperstown. The story behind Long Pond and Windsor's claim is appropriate, folksy, and satisfying to many people who believe the story reflects how hockey really started. Some visitors to the HHOF in Toronto, commenting on Trip Advisor, stated that they felt the present location of the HHOF museum was ill-suited and would prefer to see it in smaller community. If the Hockey HOF and museum was located to Windsor, it would put a vital piece in place to closely simulate Cooperstown.[20] The Baseball HOF induction weekend can account for up 20% of the museum market (assume 15% average).

Another vital piece of the Cooperstown model is the youth training camps (as well as Doubleday Field bookings). The consultants conservatively estimate these account for an estimated 70,000 visits[21], or about 25% of the market. (As Windsor would only have 1 arena (versus ~40 ballfields in Cooperstown), at this time it would be difficult to repeat this attraction in Windsor for hockey. Hence, the Cooperstown model for Windsor needs to be qualified to account for the above variances, i.e., 1) competition in the Canadian market, 2) HOF Induction ceremonies, 3) youth baseball camps. Moreover, people must know about Windsor's museum through effective advertising and promotion.

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[20] A council member in West Hants has suggested approaching the NHL to support an Atlantic Hockey Hall of Fame – he believes such support may exist. Another suggestion was NS HHF. This might give a demand boost to the proposed facility; however, it is outside the realm of the present study to determine the viability of such an initiative.

[21] Cooperstown Tourism estimates 60,000 to 75,000.

Result 1 – Revised Preliminary Estimate, Based on Cooperstown Model:

Table 6 – Projected Museum Available Market Demand

Projected Museum Market Demand for Windsor Hockey Heritage Centre	
Apparent Available Market (Comparable to Cooperstown)	14,000
Subtract: 15% Induction Market	(2,100)
Subtract: 25% Tournament Market	(3,500)
Subtract: 20% Competitive Markets Impact*	(2,800)
Total Revised Available Market Before Advertising, Promotion and Other Adjustments	5,600
*Consultant considers this estimate conservative and subject to change.	

Deriving Potential Economic Benefits

An advantage of the above projection is that the Cooperstown Model applies to a comprehensive population (the whole world) so that we can derive a local estimate of demand within a 4-hr. driving radius of Windsor, and consequently, an estimate of demand both within and outside the province. Since Cooperstown Tourism reports that 70% of their market comes from New York State (about a 4-hr. drive in any direction covers the state) and since we know that the rest of their demand comes from all over the US, North America and the world, we can apply this demand situation to Nova Scotia conditions.

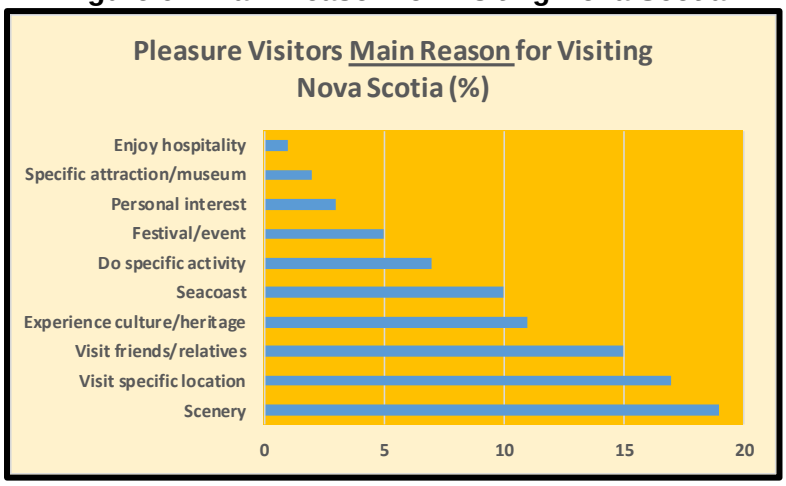
For example, if we assume that a 4-hr drive radius from Windsor covers Nova Scotia, Southern New Brunswick, and PEI and assume the population covered by the part of New Brunswick and PEI is roughly 33% of the total population of the 3 areas (about 500,000/1.5 million) we can then project that a little more than 50% of the travel spending connected to hockey museum demand will come from outside the Province (mostly from New Brunswick). These high-level estimates call for further clarification (which is outside of the realm of this study), however, with the input factors available (an estimate of visitor numbers from this study, average per person spending and number of nights stayed, via Nova Scotia Exit Surveys) an economic impact projection is possible and could at least give a sense of potential economic spin-offs.

6.2 Projection 2 – Market Segmentation Match

The consultants conducted a second market demand projection based on a market segmentation match. This is a speculative analysis as we have no exact match to the proposed Hockey Heritage Centre in the response choices. The consultant believes it does, however, help to consider another dimension of visitation potential.

Pleasure travelers to Nova Scotia are motivated to come to the province for many main reasons starting with to view "the scenery and natural landscape" (19%), to "experience Nova Scotia's culture and heritage" (11%) and to "visit a specific attraction or museum," (2%), among others.

Figure 6 – Main Reason for Visiting Nova Scotia



The following analysis is an attempt to isolate the number of new (1st time) pleasure travelers that came to Nova Scotia in 2015, and what motivated them that might relate to a new hockey heritage center.

Figure 7 – Market Segment Match to a Hockey Museum

First-time Pleasure Travelers to NS for Heritage/Culture and Museum Purposes - 2015	
Total NS visitors 2015	**2,069,200**
Pleasure Travelers (PT) as a % of all visitors	**934,000**
1st Time Pleasure Visitors to NS in 2015	**244,000**
Purpose of 1st Time Pleasure Visit - heritage/culture, museum	**59,000**
Source : Tourism Nova Scotia (2015 Exit Survey)	
Canadian visitors as % of total (est. 87%)	**51,330**
Strong hockey fans (24% of Canadians)	**12,319**
Strong hockey fans (7% of US/Overseas)	**537**
Estimated total available market (1st Time PT visitors only)	**12,856**

The above table identifies 59,000 first-time pleasure travel (PT) visitors to Nova Scotia in 2015 with the main reason of either to experience Nova Scotia's heritage and culture (96%) or visit a museum (4%). If we allow "heritage" and "museum" as a match for a Hockey Heritage Centre with first-time pleasure travelers, and then take a percentage of strong hockey fans, it can give us a sense of our present out-of-province market potential; especially if the "Birthplace of Hockey" brand is slow to take off, or be promoted.

Result 2: In Section 2.2, we report on a Canadian-wide poll that showed 24% of all Canadians considered themselves "huge" hockey fans. Using this as a bench mark for how many first-time Canadian pleasure travelers to Nova Scotia should have a high potential to visit a Windsor Hockey Heritage Centre we estimate a total of 12,319. This 24% was adjusted for US and overseas markets to account for lower interest in hockey (close to 7% in the US, and likely higher in many northern European countries) to estimate another 537 visitors, for a combined total of 12,856 visitor potential.

The above total refers to new out-of-province visitor potential only, and does not include returning out-of-province pleasure travelers estimated at 12,930 visitors[22] under this same scenario. This could raise the total available market to 25,786 (12,856 + 12,930), not including native Nova Scotia visitors. However, because of the contingencies involved (including, not a reliable match), the consultants believe these are not reliable estimates at this time.[23]

However, the above projection may provide some insight on out-of-province 1st time visitor potential, and suggests that up to 12,856 new visitors could be a target for a new museum in the province. Likely some percentage is actionable and it could merit further investigation.[24] However, at this time, the consultants believe Market Projection 1 sets more reliable market parameters.

[22] Travel motivation for "heritage and culture" is showing to be about 3 times greater in first-time pleasure travellers, than in returning pleasure travellers.
[23] For example, the market match assumes that Canadian visitors interested in culture and heritage will also have a high propensity (24%) to visit a hockey museum, while the museum market itself is generally only about 2%, or less, of the broader pleasure travel market.
[24] Perhaps a definitive question on an Exit Survey.

6.3 Summary of Market Demand Projections

Table 7 – Museum Market Demand Projections (first 3 years)

Summary of Museum Market Demand Projections for a Hockey Heritage Center in Windsor		
Demand Factor	**Long Pond Site**	**Exhibition Grounds Site**
Existing Demand (Haliburton House)*	**1,500**	**1,500**
Additional Demand (Market Study)	**3,000**	**3,000**
Exhibition Grounds Demand	**500**	**3,000**
Cruise Ship Demand	**See discussion section below.**	
Total Demand (within 3 years)	**5,000**	**7,500**

*Paid admittance for July and August, 2016 was recorded as 2,797, of which the Haliburton House Site Manager suggests about 50% (or about 1,400) was for hockey.
Notes:

- Demand refers to paid attendance (expected to be in the $5 – $8 range)
- Demand is primarily summer (peaking July – September)

Discussion of Results

The above market demand projections have been qualified by promotion considerations and reflect the consultant's best estimate of paid attendance at both sites within the first 3 years. The projections indicate that not a lot of things will change by moving the museum from its present site in the Haliburton House, to a new site – unless a lot of things happen.

Even after operating for several years, much of the public outside of Windsor isn't aware of the current museum, and it only receives comparatively small mentions on the Nova Scotia Museum website. The projections would have been lower for a completely new facility, but the consultants are buoyed by the existing market demand, which appears to be growing this year. However, the facility must be promoted strongly (which it should have time to do in the construction phase), to achieve the above projections.

There are also competitive and branding issues (the latter we will deal with separately) that will affect demand in the short and long term. If these are dealt with adeptly, it seems quite possible the museum could achieve paid admissions of 10,000 or more in 5 – 10 years. In the short term, the consultants believe the Exhibition Ground site has the potential to significant boost attendance above "normal" expectations. There are several reasons for this:

- There are a large number of visitors to the Exhibition site of varied backgrounds (e.g., different categories of horse shows, many different camper, travellers and tour groups, other activities [e.g., festivals, fundraisers, and out-of-area storage people, Playland, antique tractors, etc.]) that bring in different markets. Of the estimated 250,000 visitations per year, the consultant estimates there are at least 50,000 unique visitors, but it could be more. Many of the families at horse and other shows have comfortable incomes and money to spend. Note that the Maritime Museum of the Atlantic is similarly poised to capture large markets on the Halifax Waterfront, and benefits greatly from that location.

- Many of the Exhibition site activities are characterized by families with kids, where parents and other family members/friends often have time on their hands and would be easily able to access a nearby museum. It would be more inconvenient to travel to the Long Pond site, as present numbers at the Haliburton House museum site would suggest.

- The Exhibition Ground businesses play off each other and build each other's traffic – it offers an excellent opportunity for advertising the museum (with coupons, for example).

- The arena is also more suitably placed at the Exhibition site, where it is easily accessed from all directions. Three individuals closely involved with hockey activities at the present arena were adamant that the arena should stay in the area where it is now. Some of the major reasons included the need for nearby facilities (food/motels/service station/shopping) and easy access for visitors (that provide significant financial support to teams) who may be otherwise discouraged in attending games.

The site is also an excellent introduction to the agri-tourism community in the region and what Windsor-West Hants has to offer tourists in terms of experiencing "the richness of rural farming, wineries, rural life and small town Nova Scotia" – one of the spin-off goals often mentioned for the project. For example, there are demonstrations of food preserving and pickling, as well as cheese-making scheduled for this year's Fall Exhibition. A tent is used for breweries and cideries, and the one of the major wine companies has discussed the possibilities of showing wines at the site. A farmers' market is also being discussed.

The Exhibition Site Proposal also suggests the Long Pond site could be part of a package where the present landowner would provide the use of the land for an interpretation centre,

or sell it for the same purpose. In that case, walking trails could be marked and a commemorative marker could be placed. Anyone visiting the museum would have the option to visit the Long Pond site.

For those travelling to Nova Scotia specifically to see the site of the "Birthplace of Hockey" at Long Pond, the museum would be a bonus. They can experience the site, and then go to the museum for an even richer experience. Moreover, not every museum visitor will want to do a walking trail, and inclement weather and season would be a factor too.

In terms of the importance of the facility being located in Windsor, but at one site or the other, one question might be: "Would anyone dispute the branding of the 'Birthplace of Hockey' if it was displayed at either site?" The museum, to large extent, celebrates Windsor's, Nova Scotia's, and the region's early contribution to the game. The Starr trophy on display was donated by the Starr Skate Manufacturing Company of Dartmouth. Other artifacts came from the Mi'kmaq and various other groups from around the province and region.

Whether either one or both sites are involved, in the summertime when most tourists arrive, and the lake will not be frozen, or surrounded by snow, part of the mystique will have to be presented by photographs or other images. The whole story, with winter scenes, would seem to require being shown on film/video. (NS Museum personnel and/or other museum consultants may not necessarily agree with this view.)

The consultants consider that hockey schools/camps and tournaments offer potential for additional arena ice time sales and tourism development through the family and friends that might accompany the players. However, this potential is very much in its initial stages of development and not expected by the consultant to affect revenues to any great extent in the first three years of operations. However, these efforts should continue, and could eventually result in significant new markets. The involvement of KES could give it a big boost as many resident hockey schools are already well established. (For additional information on hockey schools and camps, see Appendix 13.)

Cruise Ship Demand

The projections do not include cruise ship market demand as presumably this market is already forecast in the Cooperstown Model Population Projection. That is, the model already anticipates that some people will arrive by cruise ship and are already included in the projection.

The present Haliburton House museum reports that they see almost no cruise ship demand. The major reason is that Haliburton House / Museum is currently not listed on tour bus/van Valley routes (e.g., wineries, Grand pre, Fundy tides). A second reason is that the facility is closed in October when about 1/3 of the 240,000 cruise passengers arrived in Halifax in 2016. The consultant believes that there could be a "bump" in demand to the current market projections, similar to the Exhibition Grounds, if tour bus/van operators offered a service to the museum. That is, some people who didn't come to Nova Scotia specifically to visit the "birthplace of hockey" and/or the museum, may learn about it when they arrive in Halifax, and take advantage of the opportunity.

About 5% of the US market are reported as significant hockey fans ("favourite sport" [25]), much less than in Canada where 24% are "huge fans," and even higher numbers may report it as their favourite sport. As well, Americans may be more interested in their own sports history than Canada's. However, if we take the numbers at face value, it equates to a new potential market demand of 12,000 (240,000*0.05). If 10% were activated, it could result in an additional 1,200 visitor demand. A stop at a hockey-related museum in Windsor remains to be developed and marketed, and it may take a few years.

Statement on Market Projections

The market projections were prepared on July 4, 2017 and reflect the consultant's best estimate of market demand for the subject facilities at that time. Market demand projections reflect the result of market research, literature searches, statistical data provided by credible agencies and assumptions regarding product, price, distribution and promotion. The consultant believes the projections provide a reasonable assessment of the situation at hand. However, any projection regarding future events is subject to change, and the change may be substantial. Thus, actual results achieved by the operation may vary from these projections and the variations may be material.

[25] http://www.theharrispoll.com/sports/Americas_Fav_Sport_2016.html

7 Brand Development and Promotion

7.1 Brand Development

"Official" Designation as the Birthplace of Hockey

MLB was essentially responsible for this brand in Cooperstown. An official designation for Windsor by the NHL or Hockey Canada would aid in this regard. Windsor should seek an official endorsement wherever it can be found.

Hockey Hall of Fame and Museum (for Windsor)

This title (and museum) was originally owned by Kingston, but taken away from them by the NHL (apparently because of slow development) and placed in Toronto. It's unlikely it will be moved from there under present circumstances; however, perhaps the NHL or Hockey Canada would approve of an Atlantic Canada Hockey Hall of Fame, or a NS Hockey Hall of Fame (Nova Scotia government could do likewise). Induction weekends could be scheduled for Windsor. However, if and how the Windsor museum would actually accommodate these suggestions would need to be determined.[26]

Exhibit Breadth and Depth

It is the consultant's judgement that the existing exhibit at Windsor is not highly competitive with other venues (e.g., Kingston), with what he has seen at the Haliburton House. It is a good collection, but it is locally and regionally-based and may not appeal to all outsiders. The Dill collection has several unique artifacts (e.g., old photographs, posters and programs), buffalo sabre sword, Starr skates from the 1800's (still in the original box), old games - and records that might be data-based as excellent archive material. This would improve the total collection, and perhaps make it competitive with Kingston, but it won't stand up to the Toronto HHOFM experience.

A good story storey can be told in Windsor, but it would seem to need to be put to a short video/movie format that hasn't been mentioned to the consultant, and hasn't been budgeted in this report (unofficially - not presently supported by NS Museum personal).

[26] While the Hockey HOF museum is rated decently by visitors, and is rated #11 on attractions in Toronto by Trip Advisor, many people are somewhat dissatisfied for a number of reasons, but including location – some people think it should be moved to a small town that would be more in keeping with hockey's historical, more cherished, roots. See Appendix 11 (end) for more Trip Advisor comments on this subject.

7.2 Promotion

Visit the Kingston HHOF Museum "It's all about marketing!"

The Kingston Hockey Museum has had a lot of experience dealing with many of the same problems that Windsor will face. The present President, Mark Potter, is very open to discussing past and present operations and is very intrigued by Windsor's operations as well ("I'd like to view their exhibits"). The consultants would recommend a trip to the Kingston Museum to learn what they have learned and apply this knowledge to the Windsor location.

Appeal to Broad Markets

The consultants suggest that if large attendance is desired, the focus of the museum has to be on more than the "Birthplace of Hockey." While this branding is likely to generate traffic from the "extreme" hockey fan segment of the market (13% - see section 2.2), many people visit a museum to experience a broader range of interests and knowledge. For example, from comments on Trip Advisor: "I sort of got tired of looking at items in glass displays - one after another after another!"; "My kids (ages 7 & 10) started skipping some of the (static) displays…(they) did enjoy the interactive activities"; "too much attention on baseball-related events and artifacts rather than baseball teams, players and historic games."

Some present Windsor Hockey Heritage Museum officials indicate they are somewhat leery of mixing the heritage theme with other hockey interests. However, this should be considered, and should be able to be accommodated in a good museum design.

Super-stars Attract Everyone

It's a no-brainer to say that Sydney Crosby is a super-star and could provide a great attraction for the museum, perhaps with his own exbibit. The Nova Scotia Sports Hall of Fame originally intended his display to be temporary. Perhaps some arrangement can be made to move the display to Windsor on a permanent basis. Bringing Sidney and other stars to the museum for various ceremonies would attract crowds and somewhat simulate an induction day ceremony elsewhere.

The Long Pond Heritage Classic has done a great job of bringing notable players to the site in the past, as well.

Promotion Strategy

It seems obvious that much of the initial strategy will focus on promoting 1) Windsor as the birthplace of hockey, 2) the origins of the game in Windsor and Nova Scotia, and 3) subsequent (local/regional) development - perhaps carrying over to the development in other parts of Canada and the world.

At least two small sports museums considered market awareness to be their biggest challenge. Because of travel considerations, local markets will be the easiest to access initially, especially with (anticipated) limited promotion funds. Websites need to be dressed up and press releases on a regular basis can help keep the facility in the public eye at relatively low cost. Perhaps the facility can also be "featured" on the Nova Scotia Museum website for some duration – "our newest museum."

Native-bred hockey players from Windsor and the region that have moved to other parts of Canada and the world would be prime targets for a mail-list and newsletter, particularly if they are still involved with organized hockey at some level. A person managing the facility's website, newsletter, etc., content could potentially manage social medial promotion as well, to enhance communication synergies. Facebook would be a preferred social media platform for its large reach, content type, and length; but other social media such as Twitter could be of assistance.

An interesting facet of the Cooperstown Model is that the Town collects promotion monies from "baseball partners" (local businesses that want to advertise their business to tourists on the town's website) - $100,000 to $120,000 per year. Perhaps a smaller scale of this would work in Windsor and benefit the promotion budget and the marketing.

The Canadian Baseball HOF museum sells ~400 memberships per year at various price levels, verbally reported as averaging about $65, suggesting another $26,000 in sales (these also entitle people to various benefits, including prime opportunities for autographs at induction ceremonies).

Merchandise sales are another major source of income ("visitors walk through the retail shop both entering and leaving"). T-shirts and hats are biggest sales. Some facilities have website-based ordering and shipping options. Of course, T-shirts and other items can become good promotion vehicles and can reach distant markets.

Almost all the facilities (big or small) had coupon offers (some on their website) for admission price savings of up to 25%. This may depend on current demand and season. All NFP museums reviewed seek donations and sponsorship monies, also on their websites.

8 Sustainability of On-going Operations

See Appendix 14 for 1) the present 2016-17 arena income statement and 2) the new facility *pro forma* 5-year projections for the Long Pond Proposal. Without further information and clarification, the Exhibition Site Proposal is prepared to accept that revenues and expenses for the new facility should be the same at both sites, except for additional demand revenues at the Exhibition Site.

The budget for the Town of Windsor shows the present (Exhibition Site) arena operated slightly in the black in 2016-17 with revenues of $225,000 almost entirely related to ice rentals (40% of that was accounted for by minor hockey alone).[27] Expenses of $214,000, included salary and wages of $80,000/year and power at $44,000/year.

The Long Pond Proposal *pro forma* projections suggest the combined future arena/museum will also operate slightly in the black in year 1, with overall revenues of $313,000, including $250,000 for ice rentals. Year one projected expenses of $309,000 include $150,000 for staff and $107,500 for power (and account for 83% of expenses).

Pro Forma - Revenue Projections Analysis

The revenues from ice sales are projected to jump 100% over the first 5 years of operations. This increase is apparently related to a longer ice season than with previous arena use, and expected hockey school development throughout the summer months. The consultant evaluated the potential for hockey schools/camps and tournaments in Windsor and concluded this will be a tough market to crack any time soon because of the state of the established competition (see Appendix 13). Moreover, even if a Windsor hockey school could be 100% successful, it appears existing ice time revenues would only increase by maximum of ~27%.[28]

However, there should be an increase in demand due to a longer ice season. Generally speaking, ice time demand falls off in May and is almost non-existent in July and August (outside of hockey schools). With the new arena, the new ice time available (especially

[27] With respect to pedestrian traffic and accessibility, it should be noted that a large percentage of ice time use is accounted for by youth hockey, figure skating, and other youth use that may not always have access to vehicle transport.

[28] It could bring some added tourism in terms of families and friends accompanying children to hockey schools.

September-October) would seem to add the potential for an additional 15% to 30% to demand.

The consultants also reviewed the population dynamics of the area. Census Canada reports the population of Windsor and West Hants together increased by 379 between 2011 and 2016. This growth rate suggests that less than 10 children per year will become available for minor hockey/skating and would not significantly affect future demand.

Taking all the above factors into consideration, the consultants would expect that present ice-time revenues of $225,000 would increase by 30% in Year 1 (based mostly on the extended season, with some small hockey school demand in the shoulder seasons) to $290,000; and increase at a modest 5% per year thereafter to about $350,000 in Year 5 – based on the information presently available.

The consultants have very little information on the other sources of revenues reported in the *pro forma* projection; however, we note the following:

1. Walking Track – it is conceivable that some type of membership could be sold with certain privileges and achieve these yearly revenues
2. Museum Revenues – assuming the museum at Long Pond is charging admission (not yet clear) these revenues seem reasonable; they are expected to be a little higher at the Exhibition Site
3. Concessions – no information to support other concessions, outside of liquid refreshment availability, and skate sharpening
4. Skate Sharpening – existing arena revenues are $500 (2016-17) so these projections appear very high
5. Special Events – no information on what these events would be; minimal design details for either hosting or meeting rooms/spaces

Pro Forma - Expense Projections Analysis

The *pro forma* projected expenses are accepted as stated with the following provisions:

1. Maintenance costs are not included
2. Snow removal/grounds cleaning and water/sewage costs are not included
3. Electricity and staffing costs seem high; may be curtailed in a smaller operation

It is understandable that maintenance charges may not be great in the first few years; however, there is no budget for any significant maintenance (e.g., shut downs) for first 5 years.

Summary of *Pro Forma* Projections

Based on the available information, the consultant suggests that revenues of ~$400,000 for the new facility seem achievable by Year 5 (versus $607,000 in the *pro forma* projection) and it seems possible that expenses (electricity and staffing, in particular) can be reduced accordingly to bring the facility into a break-even situation, or better. This estimate is based on assumptions concerning existing information and future events that could change, and materially affect, such an outcome.

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Appendix 2 – CBCL Engineering Report

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MEMORANDUM

DATE: October 23, 2017

PROJECT NO: 171029.00

MEMO TO	Robin Rodger, President – MRA Consulting Group
PROJECT NAME	Windsor Ice Arena
SUBJECT	Feasibility level infrastructure analysis and costing assessment
FROM	Keith Kelly, P.Eng (Primary Author), Audrey Muir, P.Eng (Transportation)
COPIES TO	File

INTRODUCTION

An opportunity has arisen to place and build a hockey heritage museum and arena in the Windsor area. There are two proposed locations for the facility; Long Pond and the Hants County Exhibition Center. The Department of Communities, Culture and Heritage have engaged Market Research Associates Ltd. (MRA) to prepare a feasibility study to assist in site selection process. MRA have in turn commissioned CBCL to complete this feasibility level infrastructure analysis and costing assessment for both potential locations.

As part of this study the following tasks were undertaken for both proposed sites:

- Review of the proponents proposals;
- Site visit;
- Review of previous reports and background information;
- Analysis of the Town of Windsor Water Model;
- Roadway and intersection capacity assessment;
- Discussion with the Town of Windsor regarding sanitary system capacity;
- Arial photography review for potential environmental hazards;
- High level flooding hazard identification; and
- High level zoning assessment.

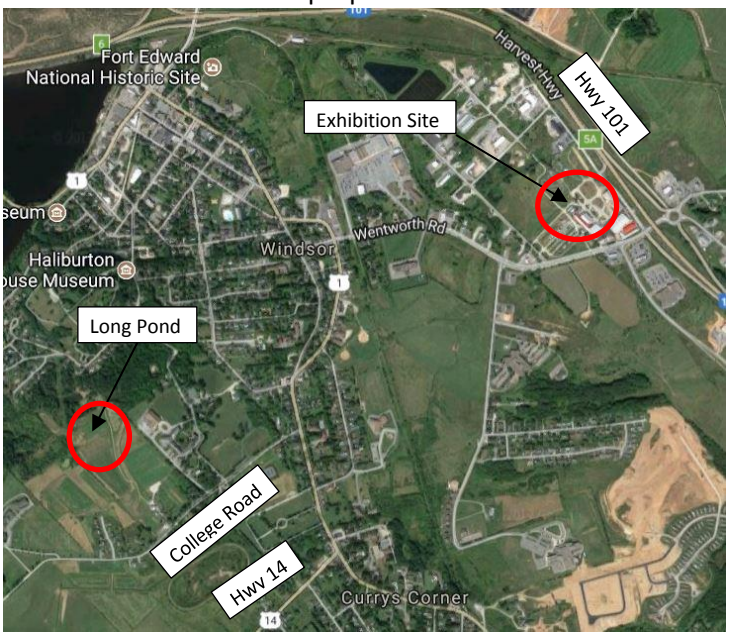

Figure 1: Site Location Map

It is emphasised this assessment involved the level of effort appropriate for site feasibility review. No detailed engineering or site investigation has been completed. Therefore the findings and recommendations given herein are based on high level analysis which is not suitable of building design or detailed engineering review. Detailed assessments of the site will be required to confirm the assumptions outlined herein and identify any potential errors or omissions should development proceed.

This memorandum discusses the following:

- Transportation;
- Site Development;
- Flood Hazard;
- Water supply;
- Sanitary;
- Environment;
- Geotechnical;
- Power;
- Site Development;
- Zoning; and
- Cost Estimation.

TRANSPORTATION

The table below shows a comparison of key criteria relating to transportation.

Key Criteria	Hants County Exhibition Centre	Long Pond
Site Description	600 – 800 seat ice arena, with 4,000 – 5,000 sq. ft. hockey museum.	50,000 sq. ft. multi-plex facility on 5 acres. 500+ seating for ice surface.
Proximity to Highway 101	Close, directly adjacent to Exit 5A.	More Distant. Visitors travel through part of the town (travel through town could represent commercial benefit), then along mainly residential streets to reach the site. Access from multiple potential exits, 5, 5a & 6.
Proximity to Other Services	Close, many other services such as restaurants, gas station and Super 8 motel are all within close proximity.	A short drive from the site to downtown Windsor where multiple services are available.
Ease of Route/Navigation/Accessibility	Highly visible from Highway 101, easy access for vehicles at Exit 5A.	Not visible from Highway 101. Potentially visible from Highway 14 (from the south shore). Intersection upgrades may be required and a high level assessment is given below

Key Criteria	Hants County Exhibition Centre	Long Pond
Wayfinding/signage	Existing exhibition area already signposted.	Site would need to be signposted from Highway 101 and through the town towards the Dill Farm/Kings Edgehill location.
Pedestrian Access	Sidewalk on north side of Wentworth Road from intersection with Glooscap Trail to the west, out to the existing exhibition arena. Pedestrian crossing also integrated with traffic signals at intersection of Wentworth Road/Cole Drive.	No sidewalks available on many of the surrounding residential streets, or on College Road.

The Hants County Exhibition Centre site is located directly off Highway 101 at Exit 5A. The site is well known, is home to the existing ice arena and is easy to access for locals and visitors from out of town. There is parking for 125 vehicles in a paved parking lot available land to increase paved parking areas and/or allow overflow parking in unpaved areas. Visitors originating from the Halifax direction (south-east) come to the site via Highway 101 and use the ramp at Exit 5A, they approach the roundabout at the bottom of the ramp on Wentworth Road. The intersection of Wentworth Road and Cole Drive acts as the entrance to the Exhibition Centre. There are green light filters in affect to facilitate Exhibition Centre vehicles. It has been assumed in this report that the Wentworth Road and Cole Drive intersection would be the access point to the new ice facility as it would not likely require any upgrades. It is noted that alternate access points have been suggested and are likely feasible. These should be reviewed at the preliminary design stage facility development. Wentworth Road is an arterial road with one lane in each direction and with protected left turn areas at the signalized intersection with Cole Drive.

Visitors coming from within Windsor or passing through the town will also use Wentworth Road from the west turning left into the Exhibition Centre. Visitors travelling from the Valley or from the west on the highway also use a ramp at Exit 5A. This ramp is shorter than the opposite ramp and arrives at a “T” intersection where highway traffic has the right-of-way over traffic coming along Industrial Drive which has to stop at the intersection. The posted speed limit for this ramp is 30 kph. Visitors from the south shore area will likely travel to the site via Highway 14 and pass through the Town before arriving at the Exhibition Centre.

The roads in the vicinity of the Exhibition Centre site are generally in relatively good condition. The full road structure is likely designed to a suitable standard to service the needs of the proposed ice arena.

The Long Pond site is located off College Road, adjacent to Dill Farm and Kings Edgehill School. The site is in a more rural area. Access to the site is limited, and mostly via local and residential streets. Some of these streets, College Road, Kings Edgehill Lane for example are

narrow with no verge, no lane markings, and pass by many residential properties. There are no sidewalks on these streets and no designated pedestrian crossing areas. These streets are not ideal for high volumes of traffic or large vehicles such as coaches which would likely travel to the new facility. The speed limits on most of the streets is 50 kph. The road structure on College Road in particular is in poor condition. It is very likely that the construction of or short term use of the new facility would trigger a required upgrade to the road structure on College Road. We understand that the Town of Windsor may be planning to rehabilitate College Road regardless of the ice arena.

While the Long Pond site is not immediately adjacent to the highway it should be noted it is a 5-7 minute drive from the Long Pond Site to highway exits 5, 5A and 6. This is a small additional travel time for any out of town visitors and as such is not likely to be considered by visitors as a significant inconvenience provided adequate way finding signage is installed. Increasing vehicular travel through the town represents a potential revenue stream for local businesses. The long pond site is likely in a more accessible location than the exhibition center for visitors traveling to the facility from the south shore via highway 14.

The capacity of the surrounding road network has been calculated as part of this report based on available traffic count data at the surrounding roads derived from the traffic study by Ekistics, dated April 2016, and manual traffic count data supplied by the Town of Windsor. Note that the spare capacity for each road is determined based on the standard volume to capacity ratio (V/C) calculation.

To identify the impact of future traffic volumes during hockey matches, three scenarios were tested shown as follows:

1. 2016 Base Scenario: This scenario includes 2016 traffic data counted by Ekistics and the Town of Windsor.
2. 2021 Future Scenario: As the development of the hockey arena is assumed to be completed by 2021, a 0.5% background growth rate was applied to the baseline 2016 traffic volumes to generate baseline traffic volume in 2021. The new trips generated by the hockey arena were then added to the 2021 baseline traffic to generate 2021 future traffic.
3. 2026 Future Scenario: 0.5% background growth rate was applied to the 2021 traffic to calculate future traffic volumes in 2026.

Although the proposed facility also includes a hockey heritage museum, the trips generated by this facility will not likely coincide with the trips generated by hockey matches. Also, the anticipated number of trips generated by the museum will be much less than for hockey matches, and will be spread throughout the day rather than a single event, say on a weekday evening, or on a weekend.

The table below shows the various road/street types in the area, their category, posted speed limit and estimated vehicle capacity per hour per lane, and V/C ratio for each scenario. Note that the capacity values are estimated based on the information available at this time.

Street Name	Intersection	Category	Lane Number	Posted Speed Limit (km/h)	Capacity (pc/h/ln)	2016 Volume Per Lane	2021 Volume Per Lane	2026 Volume Per Lane	V/C Ratio 2016	V/C Ratio 2021	V/C Ratio 2026
Wentworth	Wentworth/ O Brien	Arterial	2	60	1600	451	700	718	0.28	0.44	0.45
O Brien		Local	2	50	500	214	458	468	0.86	1.83	1.87
Wentworth	Wentworth	Arterial	2	60	1600	353	600	615	0.22	0.38	0.38
Cole		Local	2	50	250	280	286	294	1.12	1.14	1.18
King	King/College	Local	2 (one direction)	50	250	437	686	703	1.75	2.74	2.81
College		Local	2	50	250	62	302	309	0.25	1.21	1.24
King	King/Chester	Local	2 (one direction)	50	250	413	423	434	1.65	1.69	1.74
Chester		Local	2	50	250	294	302	309	1.18	1.21	1.24
Clifton	Clifton/Kings Edgehill	Local	2	50	250		119	122		0.48	0.49
Kings Edgehill		Local	2	50	250		119	122		0.48	0.49

Table 1: Road Capacity Comparison during PM Period

Note: A V/C ratio of 0.85 or lower is generally considered an acceptable level of service for an intersection. Intersections which exceed the V/C Ratio of 0.85 are highlighted in pink. Potential upgrades to each intersection which has a V/C ratio of greater than 0.85 are outlined in this report. Those upgrades should be confirmed with a detailed traffic study if the development proceeds. However it should be understood that there are many existing intersections which have higher V/C ratios than 0.85 and are considered to be acceptable in the eyes of the traffic authority of jurisdiction or the general public. The traffic authority of jurisdiction would ultimately determine the acceptable level of service for each intersection. It is quite possible that the traffic authority could deem it acceptable to have V/C ratios in excess of 0.85 during an occasional high attendance hockey match. Further discussions on this should matter should be held with the Town of Windsor and NSTIR should this development proceed.

Based on the traffic study by Ekistics, a traffic signal installation in addition to auxiliary lanes are required to accommodate the hockey arena traffic at the King/Chester intersection. An eastbound right turn lane at Chester Road would improve right turn and left turn movements. Moreover, a northbound left turn auxiliary lane is recommended along King Street to improve traffic movement along the road.

Figure 2: King Street and Chester Road

At the King Street/College Road intersection, installing traffic signals and adding auxiliary lanes on all 3 legs could improve the intersection performance. An eastbound right turn lane at College Road is recommended to separate right turning traffic from left turning traffic. In addition, a northbound left turn lane and a southbound right turn lane along King Street are required to ensure free flow conditions on through movements.

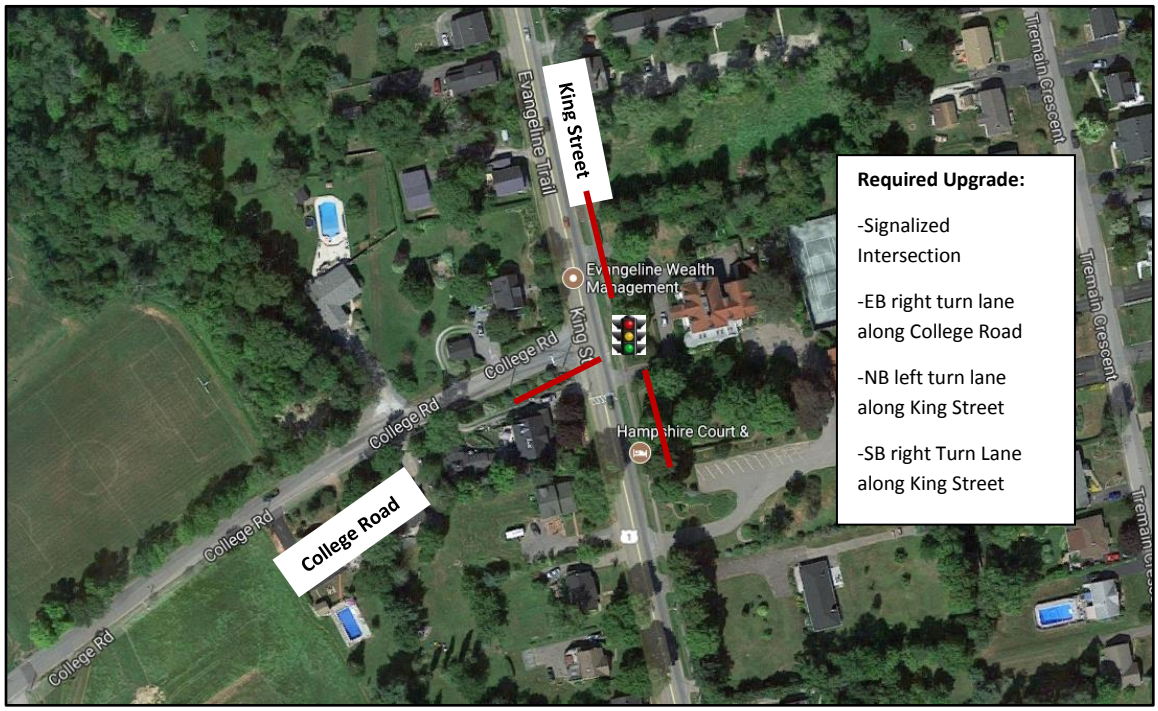

Figure 3: King Street and College Road

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At the Wentworth/O'Brien intersection, it can be seen that Wentworth Road has sufficient capacity to accommodate the hockey arena traffic. However, increasing green time for dedicated westbound left turning movement (from Wentworth Road to O'Brien Street) could help to accommodate additional development traffic. Additional mitigation measures would be required to accommodate all development traffic in discussion with the Town of Windsor.

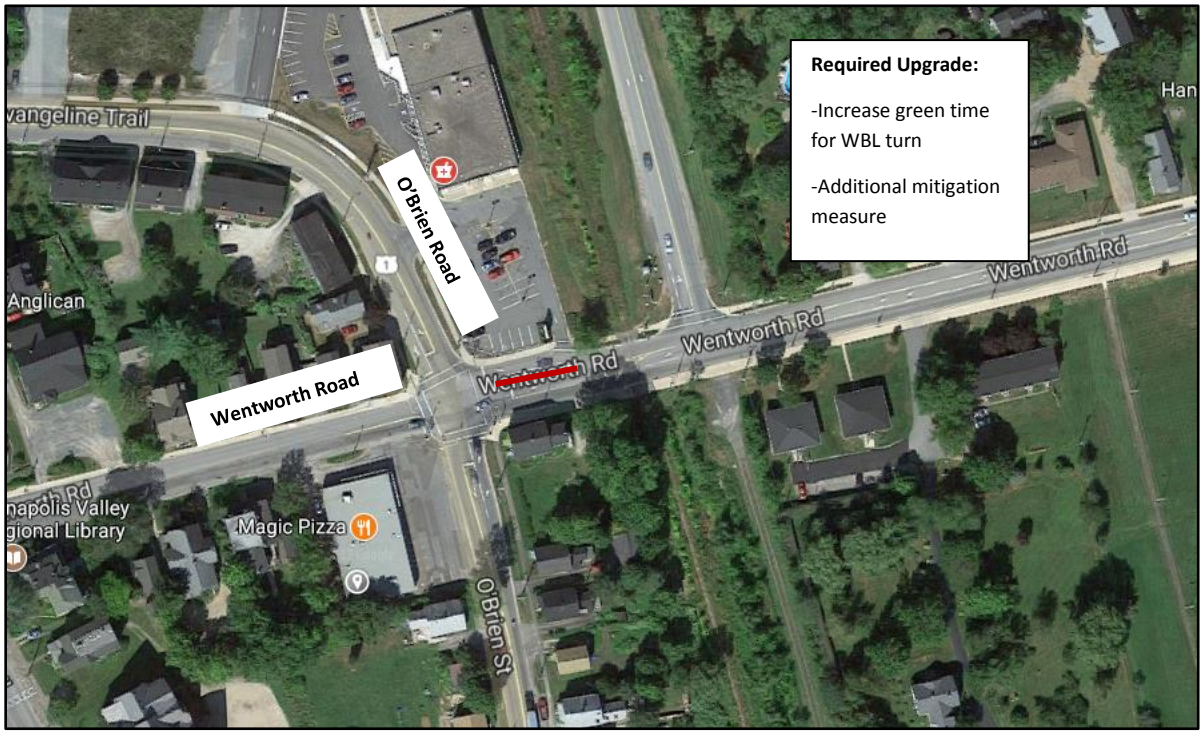

Figure 4: Wentworth Road and O'Brien Road

The Long Pond Site can be accessed from Clifton Avenue to the North or from College Road to the South, two potential accesses have been assumed for this report, one from each road. Our analysis indicated that 238 vehicles would utilize College Road and 119 vehicles would use Clifton Avenue to travel to the hockey arena. It has also been suggested that the site could have only one access point from College Road. A sensitivity analysis of the impacts of this scenario was undertaken and the results had a negligible impact to this high level analysis.

Based on the existing capacity of the Clifton Street and Kings-Edgehill Road, it is anticipated that the addition of new vehicle trips generated by the proposed development will not impact the Clifton Street / and Kings-Edgehill Lane intersection significantly. Widening of the lane would likely be required. A new intersection would be require from College Road (or the existing intersection at Bill Wade Drive could be upgraded to suit). These specific site access details do not have a significant impact on the overall site selection and as such should be addressed with at a later stage of the design development.

Figure 5: College Road with new access

PEDESTRIAN ACCESS

The existing pedestrian infrastructure in the vicinity of the Exhibition Centre is relatively well established, there are sidewalks on both sides of Wentworth Road which extend towards the town and also towards nearby hotel accommodation – the Super 8 on Cole Drive - which is within a 7 minute walk. There is little to no pedestrian actability to the Long Pond Site, it is likely that the only foot traffic to this facility would be from Kings Edgehill School.

Considering the majority of local residents live more than a 20 minute walk from either site, it is unlikely that large amounts of patrons attending games would walk to either site. Considering the size and weight of hockey gear it is unlikely that youth/adult players would walk to either facility. Visitors to the hockey museum are more likely to come from outside of Windsor by vehicle. For these reasons pedestrian accessibility is not considered to be a major element in the consideration of either site.

SITE DEVELOPMENT

The lands surrounding the Exhibition site are relatively flat. Minimal earth working would be required to develop a site at existing grade. If potential flooding issues trigger site elevation increases then a significant volume of import material may be required.

The lands surrounding the Long Pond Site undulate mildly. Some earthworks would be required to level the site for building development and parking areas.

Both sites have presented site layouts. For the purposes of demonstrating the viability of the facility on either site we have developed a feasibility level layout see Figure 6: Feasibility site layout. The layout demonstrates how a 50,000 square foot facility with parking for 250 standard passenger cars would fit on a 5 acre site. It should be noted that site constraints, vehicular circulation, coach parking or any other factors which would require additional lot size have not been included in this feasibility layout.

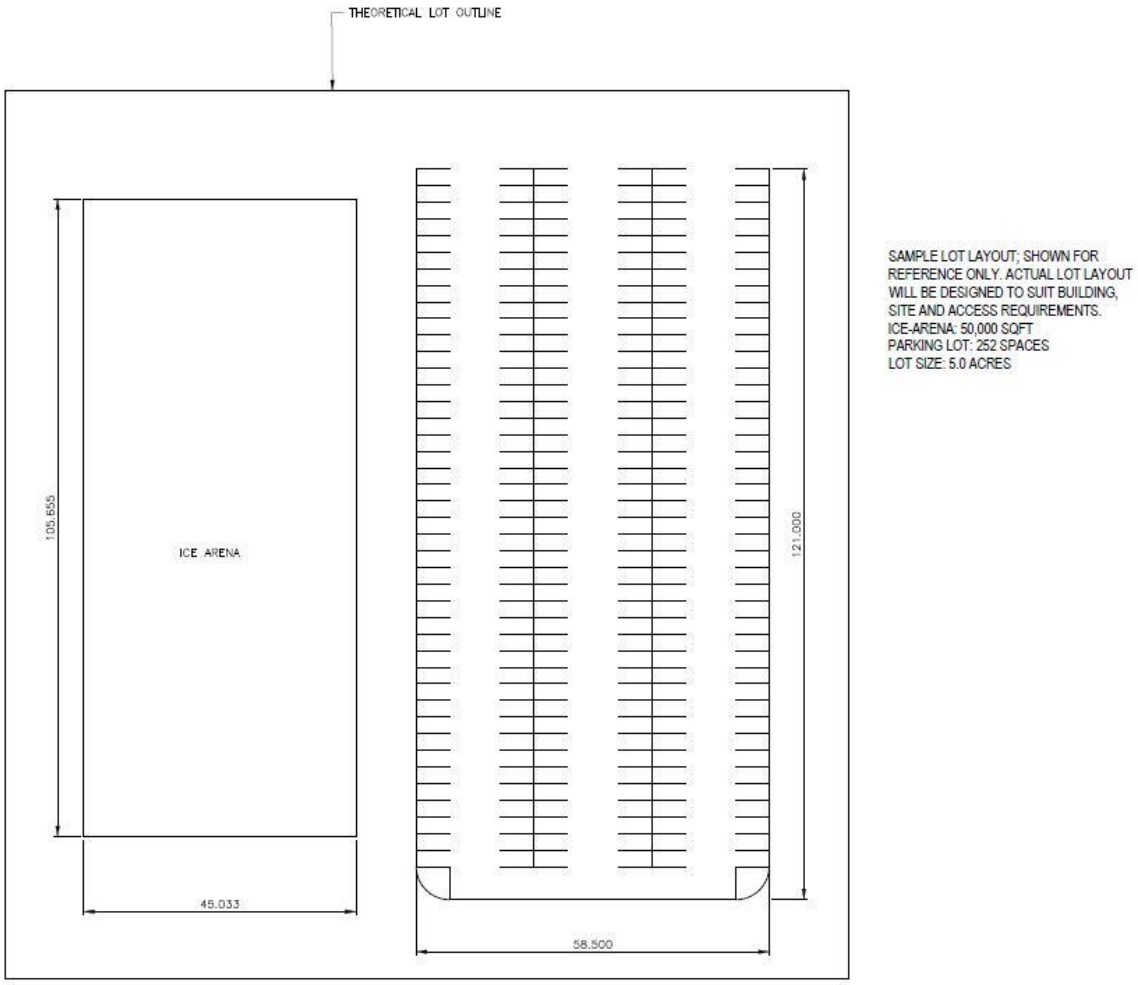

Figure 6: Feasibility site layout

FLOOD HAZARD

The Long Pond site has a minimum elevation of approximately 14m. Based on a site walk and a desk top review of the surrounding topography there does not appear to be any impediment to major overland flow leaving the site. Local landowners have indicated that water flows through the Long Pond and surrounding areas were historically more significant but that development in the surrounding area seems to have reduced the flow through this site in recent years. It is anticipated that flooding would not be an issue for this site, this should be confirmed at detailed design.

Ekistics Planning & Design prepared (a) “Traffic Study: Proposed College Park Subdivision” for the Western Regional Housing Authority in April 2016. This study evaluates College Road which would like become the primary access route to the Long Pond site. The Ekistics report notes anecdotal evidence of flooding on College Road. College Road is at elevation 7.0m±. The surrounding lands to the south are relatively low lying. Based on the high level of analysis undertaken as part of this study the elevation of College Road would have to be raised to mitigate flooding. It is unlikely that road drainage improvements would offer significant mitigation to flood hazard. Raising College Road would likely have a significant impact on a number of house driveways which access the road. Detailed design of this project is not likely to recommend raising College Road as this would be quite a costly endeavour with very limited benefit to the overall community or subject development.

An “Assessment of Flooding Hazard along the Highway 101 corridor near Windsor, NS using LIDAR” prepared by Saint Mary’s University dated October 22, 2009 evaluated the potential flooding hazards to Windsor in detail, including the Exhibition Centre Site and Long Pond site. No flooding issues were identified at the Long Pond Site which is at elevation 14.0m±. Flooding hazards were identified for the Exhibition Centre Site which is at elevation 7.0m±.

The report identifies a number of potential flooding hazards for the Exhibition Centre site including; sea water inundation, rainwater flooding and breach of the Forks Dam. Through this project CBCL also received anecdotal reports that there is simi frequent flooding on the site including in the parking area.

The risk of sea water flooding to Windsor is mitigated by a dike system along the highway and along the St Croix River. The St Mary’s report indicates future sea water level may exceed the current dike elevation when accounting for climate change and storm surge. This would cause sea water to overtop the dikes and flood portions of the town including the Exhibition Centre site.

Upstream of Windsor on the Avon River there are two NSP dams for hydro electricity generation. Should catastrophic failure of these dams there is a potential flooding hazard to the Exhibition Site. The more significant Dam is at Forks Lake, catastrophic failure of this dam is shown in the St Mary’s report to potentially result in a significant flood water depth at the Exhibition site.

The water level in the Avon River and a number of other small watercourses in the Town of Windsor is controlled by aboiteaux (flood gates). The aboiteaux protect the town by preventing sea water from entering the Avon River and the other watercourses during high tide. However the aboiteaux can also prevent rain or river water from discharging to the sea. This can cause a buildup of rain or river water on the inland side of the aboiteaux and result in flooding. Prior to a rain event the water level behind the abiteaux can be lowered, this allows more storage on the inland side of the aboiteaux. Proper function of these flood gates mitigates, but does not eliminate flooding hazard for the Exhibition Site.

Sea water inundation was identified by St Mary’s as the potential hazard which would result in the highest water elevation during a flooding event at the Exhibition Centre. A figure from the report has been extracted below and the Exhibition Centre highlighted for reference. The blue

shade indicates potential flooding, water levels on the exhibition site are shown at approximately 3.0m above existing ground.

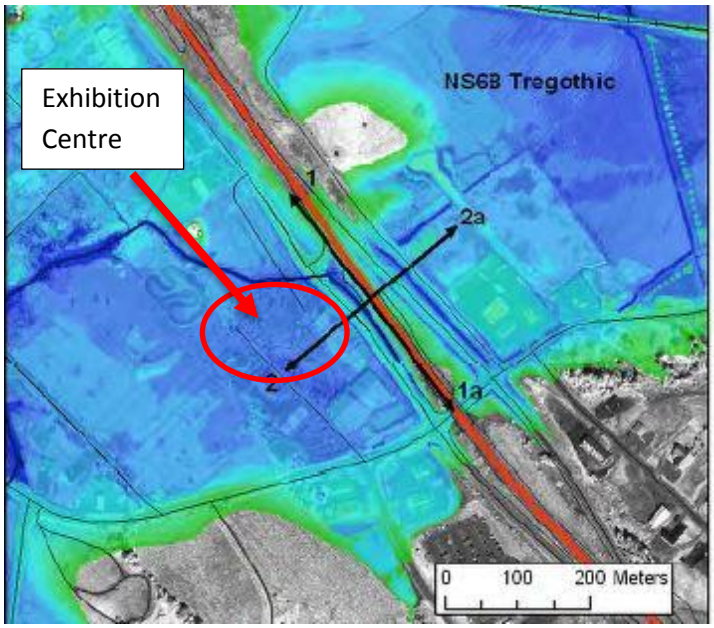

Figure 7: Extract from Flooding Hazard assessment by St Mary's

If this project proceeds at the Exhibition Centre Site it is strongly recommended that a detailed flood hazard assessment for the site be completed – this will be discussed in more detail under the Zoning section of this memorandum. The flood hazard assessment should identify all potential flooding hazards, establish of a flood construction level, detail potential mitigation measures and quantify the impact to the surrounding floodplain. The proposed facility represents a significant investment of public and private funds therefore it has been assumed herein that the building would be designed to be "safe" from flooding. Buildings within a flood plain are typically considered to be "safe" from flood hazard if they are protected to an elevation at or above a flood construction level (FCL). An FCL is typically established by adding a freeboard to the maximum flood depth. A freeboard of 0.3m has been used for this study and, based on the St Mary's report, an FCL of 3.3m above existing grade has been used for the cost estimation portion of this memorandum. The most straight forward mechanism for flood protection is to raise the building above the FCL. A building is considered to be above an FCL when the underside of a wooden floor assembly of the top of a concrete floor assembly is above the FCL. All space used for habitat, business, storage or equipment should be above the FCL.

The flood protection measures costed as part of this memorandum represent the estimated cost to import sufficient fill to raise the building pad above the FCL. It is acknowledged that would represent a significant engineering and construction effort while possibly developing an aesthetically displeasing site perspective.

Alternate mechanisms for flood construction include, but are not limited to, construction of a flood wall around the building or tanking the building such that all openings above the FCL. To explore these alternates an assessment of the surrounding soils and building design would be

required which is beyond the scope of this work. These alternatives could be explored at the design stage of the project.

The facility could be constructed below the FCL. This would not be recommended. The lower the building is constructed the higher the frequency and/or probability of flooding becomes.

As noted flooding from the sea represents the highest potential flooding elevation within the site. The sea dike elevation may be increased as part of the highway twinning project to offer increased flood protection for Windsor but this has not yet been confirmed.

WATER SUPPLY

CBCL utilised the Town of Windsor water model to determine the available potable (drinking) water and fire suppression water supply for both sites. The model indicates that the conveyance capacity of the water system is likely adequate to meet the potable demand at both sites. Typical fire flow requirements for commercial or industrial land use is 13,620 liters per minute. The model indicates that the system cannot supply 1,360 liters per minute to either site. Available water supply information is given below.

400 College Road (Long Pond)

- Nighttime Flow (Tank Filling): 97.5 psi;
- Nighttime Flow (Tank Full): 99.5 psi;
- MDD (Tank Filling): 95.8 psi;
- MDD (Tank Not Filling): 98.5 psi;
- FF under MDD: 12,240 Lpm; and
- Residual at FF Node under MDD: 68.0 psi.

The modeled available fire flow in this location (12,240 Lpm) is slightly less than the “typical standard” for this type of development (13,620 Lpm). It is possible that the required fire flow for this development could be reduced in line with system conveyance capacity through appropriate building design and alternate fire suppression solutions.

221 Wentworth Road (Exhibition Centre)

- Nighttime Flow (Tank Filling): 93.5 psi;
- Nighttime Flow (Tank Full): 91.2 psi;
- MDD (Tank Filling): 92.5 psi;
- MDD (Tank Full): 91.0 psi;
- FF under MDD (Tank Full): 8,575 Lpm; and
- Residual at FF Node under MDD: 82.3 psi.

There is an altitude valve in close proximity to this site which restricts flow to this site. The purpose of the altitude valve is to insure there is turnover in the nearby reservoir and avoid the reservoir water becoming stagnant. The altitude valve is typically closed. When the valve is closed the available fire flow (8,757Lpm) is significantly less than the “typical standard” for this type of development (13,620 Lpm). When the water level in the reservoir drops to a certain elevation this altitude valve opens and increases the available supply to the site. When the altitude valve is open the available fire flow is shown to exceed 13,620 Lpm. It is likely that the

system could be reconfigured to supply the required fire flow to the Exhibition Centre site but some further analysis would be required to determine how this would be done and some adjustments to the existing water system would likely be required.

Municipal Sanitary Connection

We have had discussions with the Town Engineers regarding the existing sanitary systems in the vicinity of both sites. The town have indicated that there should be available capacity in the existing sanitary system to meet the demand at both proposed locations. It is likely that a small localised pumpstation will be required for the Long Pond Site.

Environmental

There is a small open water channel flowing to the rear of the undeveloped site adjacent to the Exhibition Centre site. An environmental assessment should be completed to determine appropriate setbacks and development impacts. It is understood that the majority of rain runoff from the Town of Windsor is directed to this water course.

There Long Pond site appears to have a drainage course running alongside the existing access road. Environmental study would be required to determine potential development impacts of this drainage course.

Geotechnical

Windsor is typically dominated by clay soils. Deposits of Gypsum are common. There are areas in Windsor with expanding clays. Further geotechnical investigation would be required at the time of preliminary engineering design to identify any site specific geotechnical inssues.

Power

For the long pond site there are currently 3-phase power lines installed on College Road and Clifton and a loop between Clifton and College Road to the west of the site. It is anticipated that the power supply in this area would be adequate to service the development. On the Exhibition Arena site there is three phase power on the site frontage. It is anticipated that the power supply in this area would also be adequate.

For both sites power would have to be brought to the new building from the existing lines.

The sites are in the same general area therefore they have approximately the same solar power generation capacity. The amount of power generated is more dependent on the orientation and angle of the solar panels rather than the specific location. It is anticipated that the best return on investment for solar power in either facility would be to enter the Solar Electricity of Community Buildings Pilot Program or some equivalent to sell power back to the grid. The financial impacts of any alternate method of utilising solar power (such as the traditional net metering) should be lifecycle costed.

Heritage gas do not have any gas lines in Windsor. There are some facilities in the region, such as the Acadia University in Wolfville which operate compressed natural gas, delivered by transport truck.

ZONING

Rezoning would be required for the Long Pond site where the lands are currently zoned as residential. The surrounding lands are zoned "Community Use" it is assumed that a similar zoning to the surrounding community use would be appropriate alternatively the grounds could be zoned commercial. There is limited existing commercial zoning in the vicinity of the site. Any future commercial development triggered by this project would likely also require rezoning

The Exhibition center lands are currently zoned commercial, a review of the commercial zoning allowances is required to confirm that it would cover the proposed development. The surrounding areas on the east side of the highway are zoned a mix of commercial, community use and residential. There is significant commercially zoned land on the opposite side of the highway.

The Exhibition centre lands are noted on the town's zoning map to have environmental constraints. This is used to identify lands which are subject to flooding or subsidence, are low lying, marshy or unstable, or have other constraints for development by virtue of soil conditions of topography. It is noted in the zoning bylaw that developments within this zone will diminish flood water storage capacity of the flood plain and cause flooding to be more prolonged and widespread. The high public and private costs associated with property damage, pollution and even loss of life because of serious tidal or freshwater flooding can be avoided by regulating or prohibiting development within these areas. A full study of the Exhibition centre site would be required to identify any environmental constraints including flooding, drainage capacity, bearing capacity of soils.

COST ESTIMATE

A feasibility level order of magnitude cost estimate has been prepared for both sites. The purpose of the cost estimates was to identify the financial implications of developing at either site form an engineering and infrastructure site which will allow a financial comparison to be drawn between the two sites. The cost of the facilities are not included in the estimates as it is assumed that the optimum building design would be chosen regardless of the site and therefore the cost of the arena should be a wash.

The proponents for both sites have submitted cost estimates with varying levels of cost breakout. Based on the provided costing and wording of the proposals have assumed that the costs provided in both proposals include connections to the existing road, water, sanitary and storm infrastructure and provision for typical site development such as parking and landscape areas. These are considered to be the standard "on-site civil construction costs".

In addition to the standard on-site civil costs there are non-standard on-site civil construction costs and off-site civil construction costs. We do not believe that either proposal has accounted for these costs. We have focused our cost estimates on these costs to highlight the financial engineering comparison between the two sites.

We consider the Exhibition Arena to have one non-standard on-site civil construction cost which would not likely have been included in the proposal. This is flood protection to an elevation of the 1:100 year design storm event. We have included a price to import enough material to raise the

proposed ice arena above the 1:100 year flood water level. It should be acknowledged that no costs are included any compensation for development within a flood plain and subsequently increasing the overall flood construction level in the area.

We consider the Exhibition Arena to have one off-site civil construction cost which is not included in the current proposal: reconfiguration of the altitude valve in Wentworth Road.

We do not consider the development of the long pond site to involve any non-standard on-site construction costs. It should be noted that the proposal allows approximately $1.2m for site preparation, roads, site servicing and site flat work. The Exhibition Arena proposal does not offer a similar breakout, it is estimated that the cost to provide an equivalent level of service to the Exhibition arena is approximately $550,000.

The Long Pond site will require a number of off-site upgrades. These are intersection upgrades which are broken out in the detailed cost estimate attached.

The cost estimate summary is as follows:

	Exhibition Arena	**Long Pond**
On-Site Civil Construction Costs (Accounted for in proposals)	$550,000	$1,190,000
Non Standard On-Site Civil Construction Costs	$700,000	
Off-Site Civil Construction Costs	$75,000	$1,210,000
Total	**$1,325,000**	**$2,400,000**

SUBMISSION

We trust the above information adequately addresses the scope of work outlined in the request for proposal. If you have any questions or comments please do not hesitate to contact the undersigned.

KEITH KELLY P.ENG

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CBCL LIMITED
Consulting Engineers

OPINION OF PROBABLE CONSTRUCTION COST
Windsor Arena Site Selection Feasibility Study
Windsor, Nova Scotia
ORDER OF MAGNITUDE - CONCEPTUAL BUDGET

DATE:	October-23-17
CBCL FILE No.:	171029
PREPARED BY:	AT
EST. DESCRIPTION :	ORD MAG

No.	DESCRIPTION		Hants County Exhibition Park AMOUNT	Long Pond / Kings Edgehill AMOUNT
A	**CIVIL - Onsite Costs**			
1	Site development and servicing		$ 550,000	$ 1,190,000
1	Flood Protection		$ 700,000	Not Applicable
B	**TRANSPORTATION & ROAD WORK - Offsite Costs**			
1	Figure 2: Intersection - King Street and Chester Road LP		Not Applicable	$ 510,000
2	Figure 3: Intersection - King Street and College Road LP		Not Applicable	$ 680,000
3	Figure 4: Intersection - Wentworth Rd & O'Brien Rd LP		Not Applicable	$ 20,000
4	Municipal Water Upgrades		$ 75,000	Not Applicable
	SUB-TOTAL - DIRECT & INDIRECT CONSTRUCTION COSTS		**$ 1,325,000**	**$ 2,400,000**
	TOTAL - DESIGN and BUILD PROJECT COSTS without HST		**$ 1,325,000**	**$ 2,400,000**
	HST (NS)	15%	$ 199,000	$ 360,000
	TOTAL - CONSTRUCTION COSTS with HST		**$ 1,524,000**	**$ 2,760,000**

THIS OPINION OF PROBABLE COSTS IS PRESENTED ON THE BASIS OF EXPERIENCE, QUALIFICATIONS, AND BEST JUDGEMENT. IT HAS BEEN PREPARED IN ACCORDANCE WITH ACCEPTABLE PRINCIPLES AND PRACTICES. MARKET TRENDS, NON-COMPETITIVE BIDDING SITUATIONS, UNFORESEEN LABOUR AND MATERIAL ADJUSTMENTS AND THE LIKE ARE BEYOND THE CONTROL OF CBCL LIMITED. IT IS NOT A PREDICTION OF LOW PRICE. AS SUCH WE CANNOT WARRANT OR GUARANTEE THAT ACTUAL COSTS WILL NOT VARY FROM THE OPINION PROVIDED.

Note 1	A Design Development Contingency is to allow so that necessary design changes can be made as the design is developed
Note 2	A Construction Contingency is to allow for cost of additional work over and above the Original Contract Award Amount
Note 3	The Escalation/Inflation allowance is for increases in construction costs from time the budget to Tender Call
Note 4	The Location Factor is for variances between construction costs at the location of the project & historical costs data

Form CBCL 035.Rev 3

Appendix 3 – Supplementary Summary of Proposals

Supplementary Summary of Proposals

1. Overview of Both Proposals

The proposal to build a Hockey Heritage Centre at Long Pond was developed over many years and has appeared in different written versions since at least 2015. The proposal has been updated in the last few months and is now designated Version 5. Although it seems there are not substantial differences in these versions (outside of design and cost considerations), it appears the second (Agricultural Society) proposal responded to various news and website reports of the project, rather than any written version of the Long Pond proposal.

Each proposal has positive and negative aspects; as well as many similarities, including:

- Both proposals have the same goals in mind – to preserve and promote Windsor's historical hockey heritage – and to develop hockey-related tourism and arena demand to the economic benefit of the community.
- In response to the Long Pond proposal, the Exhibition Site proposal acknowledges that "head to head costs to build a comparable facility on any site should be identical, subject to the variation in additional infrastructure."
- In response to the Long Pond proposal, the Exhibition Site proposal acknowledges that starting arena operational expenses should be the same at both locations – assuming the same level of demand.
- Both proposals have a similar governance/ management proposal, with small differences.
- Both proposals assume the facility will begin debt-free and that that local governments will cover any operating cost over-runs after the facility is built.
- Both proposals have provided some conceptual drawings of the proposed facility, but both suggest that final details and costs are not yet available.
- Neither proposal presently includes a budget for interior design and equipment (e.g., display cases for exhibits, lock up storage space, projectors, turnstiles, interactive sports game exhibits, theming artwork, etc. - estimated at $300,000+).
- Neither proposal makes an allowance for possible <u>additional</u> infrastructure costs.
- Neither proposal presently has an agreement or understanding with the Windsor Hockey Heritage Museum; particularly regarding space requirements and leasing or payment arrangements (if any) in the new facility.
- Costs for an ice plant and equipment (e.g., Zamboni) are assumed to be included in the building capital costs of both proposals.
- It appears to the consultant that building cost estimates for both proposals should support the construction of a high-quality museum and arena.[1]

[1] The consultant notes that an NHL-sized arena, with 400-seating capacity, heated stands (from recycled energy), several dressing rooms, ice resurfacing machine, attached gymnasium, hospitality center, and administration offices was built in in PEI in 2011 for a reported $5 million; see http://www.cbc.ca/news/canada/prince-edward-island/new-evangeline-rec-centre-opens-1.1122174

Note that both written proposals have been modestly updated during this investigation through verbal communications and various documents. The following information describes, what the consultant believes, are the key elements of the respective proposals.

2. Key Elements of the Long Pond Proposal (Windsor-West Hants Proposal)

Introduction

A key component of the Long Pond Proposal is the need for visitors to experience the whole story of the birth of hockey at Long Pond, adjacent to King's-Edgehill School (KES) – that means the exhibits could include, for example, the surrounding space and trails, including Long Pond, the "Punch Bowl," Haliburton House, and the entire arena complex itself. It is thought that to engage visitors they need to understand the whole story of Long Pond and visualize how and where students played the game 200 years ago, original influences (e.g., Mi'kmaq), and how it developed from there. It is believed this very important experiential impact of the facility will lost if it is not situated at the Long Pond.

> "(The Hockey Heritage Centre)… will be a living testament designed to provide a meaningful interpretation of the culture and history of hockey with the arena, ice surface, and walking track all part of the exhibits of the Hockey Heritage Museum.)
> – from the Long Pond Proposal

Assumptions Behind the Proposal

- Belief there is an urgent need to replace the present arena
- Opportunity for the new arena to celebrate the "Birthplace of Hockey"
- "Thousands of people will visit Long Pond to celebrate the origins (of the game) and create an "international hockey Mecca"
- Belief that the new facility will duplicate the economic success of Cooperstown, NY; the "Birthplace of Baseball"
- It will establish "Windsor and Nova Scotia as a unique, high-quality destination point for international hockey fans and travelers"
- It will boost multi-night visits and "foster a compelling destination brand for Windsor, West Hants and Nova Scotia"
- Educate the world about Nova Scotia's undisputed role in the creation of hockey through the hockey museum
- Belief it will draw "international hockey teams and players to compete on the NHL-sized ice surface"
- It will "transform the local economy by encouraging visitors to drive through the town and region to experience the richness of rural farming, wineries, rural life and small town Nova Scotia"

- It “will be an economically self-sustaining investment with multiple revenue streams including sponsorships, merchandise, and rentals”
- As an economic catalyst, (the hope is) it will result in:
    - Increased business investment including new and upgraded accommodations and revitalization.
    - New business opportunities related to tourism and agri-tourism.
    - Increase in demand for existing tourism operators such as On-Tree (Ski Martock) and local retail outlets and restaurants.
    - Increased tax revenue for the Town of Windsor and Municipality of the District of West Hants.

Facility Concept and Operation

- 50,000 square-foot facility located on a five-acre parcel of land currently owned by the Dill Family, located north-west of the King’s-Edgehill School campus.
- The Dill family is retaining ownership of Long Pond “lake” and the surrounding property – at present, permission must be obtained to skate on, or walk around, the lake.
- It will be “more than a rink or a museum… The entire facility is a shrine dedicated to the game of hockey.”
- Specifically, the building will include:
    - A NHL-sized ice surface and dressing rooms and 500+ capacity seating
    - Museum space uniquely designed into the whole building devoted to the education and celebration of hockey heritage to ensure hockey fans and travelers have a unique memorable experience
    - A walking track with hockey museum artifacts and displays around the track
    - The hockey arena will be an exhibit in the Hockey Heritage Centre, used to display (as appropriate) artifacts or highlights of the history of hockey.
    - There is no plan to install a restaurant on the property. A kitchen or canteen (offering “pre-packaged and hot and cold beverages”) may be installed, depending on availability of funds.
- Only conceptual designs are available at this stage (prepared by internationally recognized architect Talbot Sweetapple of MacKay-Lyons Sweetapple Architects in Halifax), but will be moved to the design phase after consultations are completed with museum groups and the Windsor Hockey Heritage Society (who have indicated they wish to relocate to the new facility)
- Museum space is presently unspecified and/or undefined (exhibits could be partially, or fully, placed around the walls). “Space is up to 3,000 sq. ft., but the whole site is an exhibit, the museum may not be in a separate space. Possibly on the second level – visitors can take the stairs or elevator up, then have a separate entrance to block off and change admission.”
- Terms concerning space, length of term, rent, insurance, gift shop, etc. have not yet been settled/signed with Windsor Hockey Heritage Society (WHHS) or the Dill family. The WHHS would like to see free rent or profit-sharing.
- Admission charges (if any) to the museum have not been settled (“A Management Board will be struck by the Corporation partners to oversee such details. At this stage, fees are

a likelihood but who collects the revenue and who has the expenses have yet to be worked through”).

See Appendix 4 for present Building Concept schematics.

Long Pond Project Cost and Funding

The total project cost of the facility (excluding display costs) is estimated at $12,755,645 after a HST rebate of $1,286,700. (revised by proponent 9/18/2017)

1. The proposal cash flow projects the operation of having funding needs of $4,208,980 in Year 2 for construction (revised to $4,756,355 by MRA 9/18/2017). If these funds don’t materialize, the operation could face a funding shortfall of up to $3.4 million. The source of the funding is expected to be “a combination of fund raising and debt financing as the cash flow always assumed that the final fund raising would come in over years 1 to 5. Therefore, the Municipal Corporation would have to borrow funds to complete construction. As the federal government and province remit their share of the funding, the debt will be drawn down. Fund raising would also be applied to the debt first, then operations enhancement.”
2. With the revised building cost estimate, MRA expects presently projected financing costs to rise in the region of $300,000
3. A purchase offer (dated April 26, 2017) has been received in writing from the owner of the property Danny Dill. Land costs are quoted at $.80/sq. ft. (4,3560 sq. ft./acre). Cost of 5 acres is indicated as $174,240 before surveying.
4. Previous fundraising commitments (elsewhere reported as up to $1.35 million) are now in some doubt.

Governance

The Municipalities of Windsor / West Hants have agreed to sign an Inter-Municipal Agreement to form a Hockey Heritage Municipal Corporation. The agreement includes that local governments will cover any operating cost over-runs (presently approved for the Long Pond site only). See Appendix 7 for the tentative agreement and Appendix 6 for the proposed organizational chart for the Hockey Heritage Centre.

The Municipal agreement “speaks to an operating board and a facility manager overseeing operations and staff. Councils would retain final approval of a recommended operating and capital budgets with regular reporting.” (Apparently, the Municipal Agreement is for a five-year term at the end of which government funding will expire and the agreement can be dissolved with responsibility for certain liabilities assigned to either/both partners; 2-year notice before dissolving the partnership by either/both parties.)

3. Key Elements of the Exhibition Site Proposal (Agricultural Proposal)

Introduction

The Exhibition Site Proposal is judged to be largely agreeable to the basic concept of the Museum and Arena as described in the Long Pond Proposal (Version 5).[2] However, their proposal is suggesting the Exhibition Grounds would be a better site for the following reasons.

Assumptions Behind the Proposal

- The ultimate goal is to showcase to the world, via a hockey museum, that Windsor/West Hants is "The Birthplace of Hockey."
- Relative to the Long Pond proposal, it should be less expensive to build on the Exhibition Site as the required onsite infrastructure (e.g., water, sewage, power) and offsite infrastructure (sidewalks, signage and high-traffic roads) are already available.
- By leveraging existing site visitor traffic, adjacent amenities, proximity to highway access and the level of visibility, the proposed location will maximize exposure and increase potential visits to the museum site.
- Events and attractions at the Exhibition site are growing yearly and there are plans for a new farmers' market (in the preliminary investigative stage/part of strategic planning) that could bring in even more traffic.
- A facility built on the Exhibition Site does <u>not</u> preclude the use of the Long Pond site for additional development, subject to the owner's consent.
- A funding proposal that would preclude the need for additional fund-raising efforts and financing costs, time delays, and possible cost-overruns with additional financing charges.

Facility Concept and Operation

The proposal offers two options for facility development:

1) A building comprised of an arena and a museum where the museum is in a freestanding lobby area facing street-side that would facilitate easy access, high visibility, and continued use when tourism activity is significantly higher in summer and the arena is ice free. An enclosed museum should also favour reduced lighting, air-conditioning and other maintenance costs when the arena was not in use, rather than a museum located within the arena area itself. Square footage of the museum to be determined in consultation with the Hockey Heritage Society. Note: While the present Long Pond proposal is for 500 seats, with the potential to add up to 50 seats on a second level, the Exhibition Site proposal recommends a minimum of 800 seats and provides a preliminary construction quote for a 600-seat facility with a quote for the cost of an extra 200 seats.

[2] "This (Agricultural Society Proposal) does not include any projection / assumptions re: operational revenues and costs, with the rationale being those will be largely duplicated, regardless of site selected. The notable exception being museum traffic volume and accompanying revenue, which would potentially be impacted by site selection."

2) A second option is to use the present O'Brien Building as the site of the museum, with a covered walkway to the arena.

Schematics of the main facility option (free-standing, without the O'Brien building) is provided in Appendix 5.

Main Costing Proposal
Based on the available information, the proposal identifies facility cost estimates as "generically and preliminarily verified with a few construction sources:"

- The free-standing 600-seat arena and museum would have construction cost of $8 million to $10 million (average $9 million), net of HST (note: HST payable would increase cost by 4.29% to $9.386 million). Total costs also exclude exhibit display costs, land purchase or leasing costs and any on-site services costs.

- To add an additional 200 seats (recommended) would add approximately 2,000 square feet to the building and approximate additional costs of $250,000 to $500,000, which could be managed / minimized by layout.

- It is expected that the Hockey Heritage Municipal Corporation will lease the land for the new facility. Long-term leasing of the land would allow a further reduction of up-front capital costs.

- Purchase of the land for a free-standing building would be subject to a future Agricultural Society board decision, and if approved, would require appraisals based on a number of cost options, such as where actual placement would occur. (revised by proponent 9/27/2017).

Supplemental Costing Option
The Exhibition site has a free-standing 6,000 sq. ft. brick building in apparent good condition that might lend itself to museum use. Incorporating the "O'Brien building into the project would require an engineer's assessment as to whether the building is structurally and economically feasible." The O'Brien Building has a proxy value of +$400,000 (for insurance purposes), requiring compensation to the Agricultural Society. There would also be some conversion costs, but a reasonable assumption is that this would represent a net decrease in project costs. Whether the museum resides in the main arena or in the former O'Brlen Building, the project would involve direct consultation and decision making input from the museum operator (Hockey Heritage Society) so as to achieve optimal operation of the museum and maximize museum traffic count. This option also offers the benefit of an existing paved 125-car parking lot and a licensed kitchen facility, if desired.

- "Costs include a [to be independently determined] payment to the Agricultural Society for the contribution of the O'Brien building to the project. The building has an estimated value in excess of $400M but this to be determined value / cost to

the project would be reflective of the need for necessary expenditures required to modify it for use in the new project. It is also reflective that the compensation covers the building only. The land of the O'Brien Building and for the arena would be long term *leased (*annual amount to be independently valued and agreed) from the Agricultural Society, thereby reducing the project's capital cost, as there will be no land purchase component."

- Purchase of the O'Brien Building land would be subject to a future Agricultural Society board decision, and if approved, would require appraisals based on a number of cost options, such as actual modifications required. (revised by proponent 9/27/2017).

Proposed Funding Sources (with the majority to be received@ 20%per year)

Municipal Gov'ts	$3,000,000
Provincial Gov't	$3,000,000
Federal Gov't	$3,000,000
King's-Edgehill	$ Nil
Total	$9,000,000

A potential $1 million King's-Edgehill contribution for an arena on the King's-Edgehill/ Long Pond site would be replaced by $500,000 incremental injections from each of the Town and Municipality. The Municipal units would still be well ahead in terms of financial contribution, as all investment would be project specific versus additional infrastructure improvements to try and Improve access to the alternate site. Proposed overall project specific costs remains well below the alternative and there is no requirement to rely on fund raising component and (if delays occur), additional financing costs.

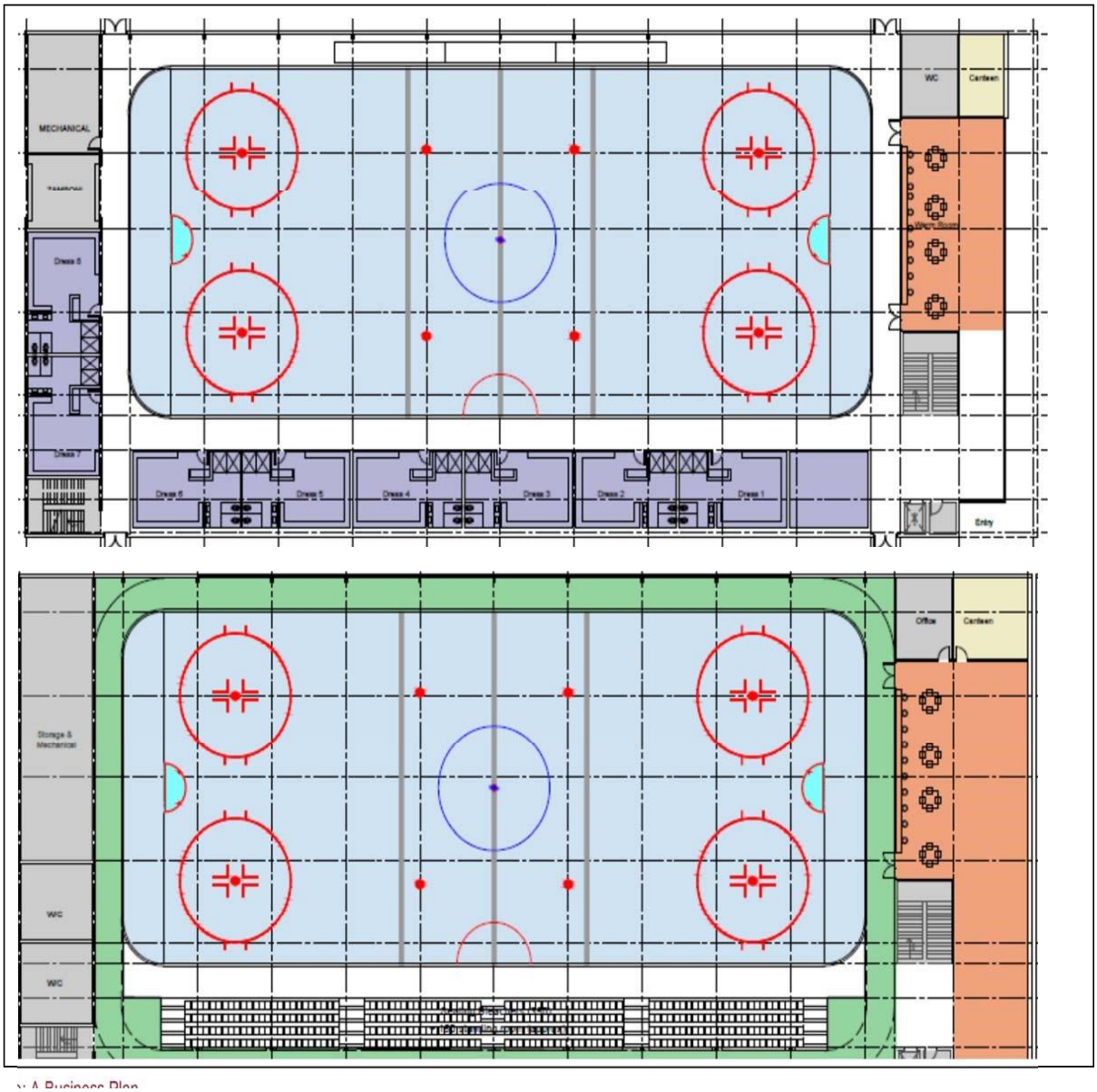
Governance

The Agricultural Society is also suggesting an eight-member management board similar to the Long Pond proposal in that there would be two non-elected members and one elected member from both the town and municipality, but would be looking for a member from the Agricultural Society and the Hockey Heritage Society or the NS Museum. (see Appendix 6, Page 2)

The facility will be operated by a full-time manager, who may be cost-shared by the Agricultural Society in downtimes. The Agricultural Society considers it has significant facility management experience, including arena management familiarity.

Appendix 4 – Long Pond Facility Conceptual Design

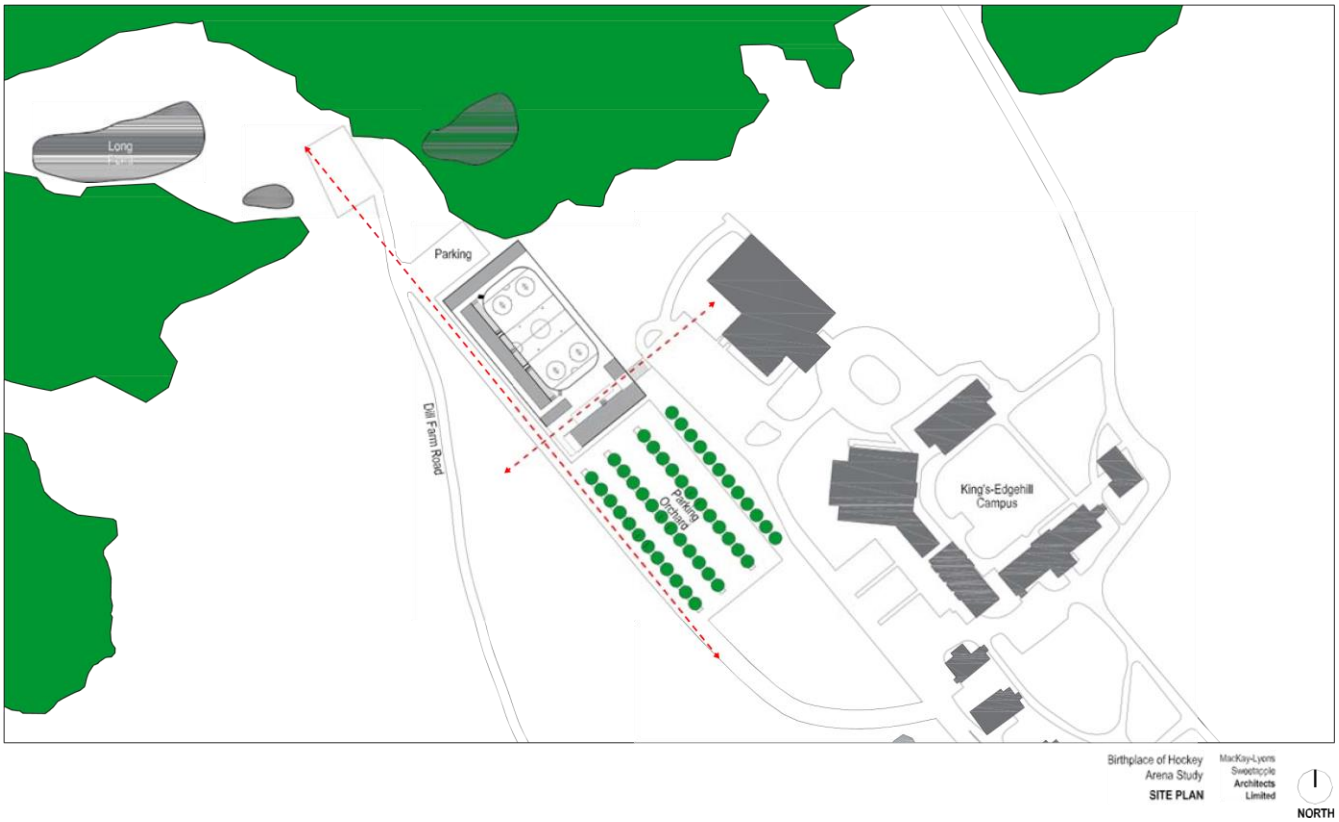
Conceptual Design



Please note that this is a conceptual design and until the Hockey Heritage Society and other hockey artifact donors and museum experts are consulted on how the interior design will look, it remains a conceptual drawing. The layout of dressing rooms and show windows and other heritage and museum components will be evident when the project goes to the design phase incorporating all the features noted.

The following site plan does not adequately identify the egress to the property. Kings Edgehill have provided written confirmation of their willingness to provide unfettered access to the Hockey Heritage Centre through existing roadways adjacent to publicly owned streets of Clifton Avenue and College Road. Preliminary soil testing has been completed for the site which does

adequately support the conceptual design. The letter from Kings Edgehill is attached and a copy of the soil testing can be provided, if requested, at a small cost to the partners. This work was done pro-bono and it is the intention, upon confirmation that all funding is secured, for the parties to acquire the formal documentation for use in the development of the final specifications leading to the issuance of a design-build public tender proposal.

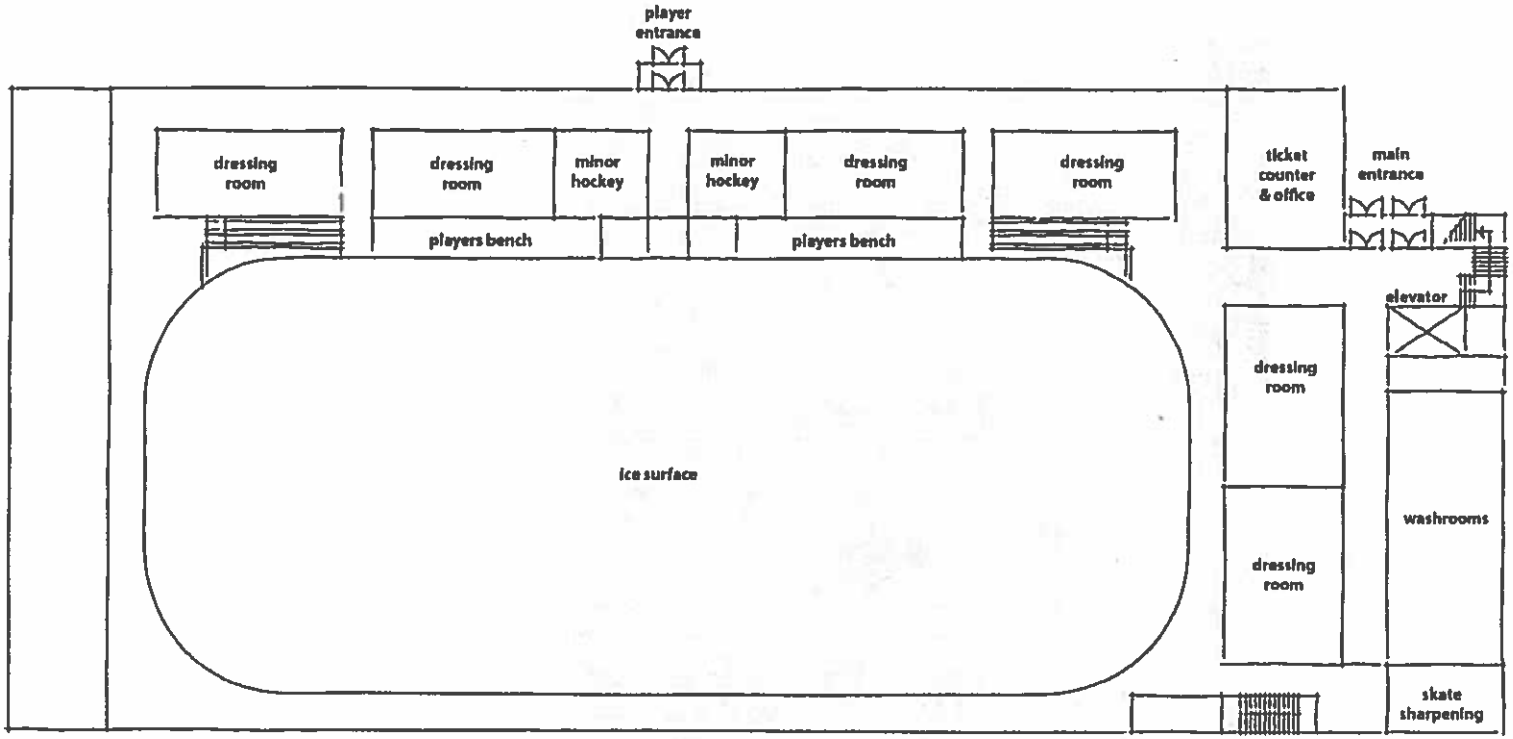


Appendix 5 – Exhibition Site Facility Conceptual Design

Free standing option

Birthplace of Hockey Centre

Hants County Exhibition Park
Windsor, Nova Scotia, Canada



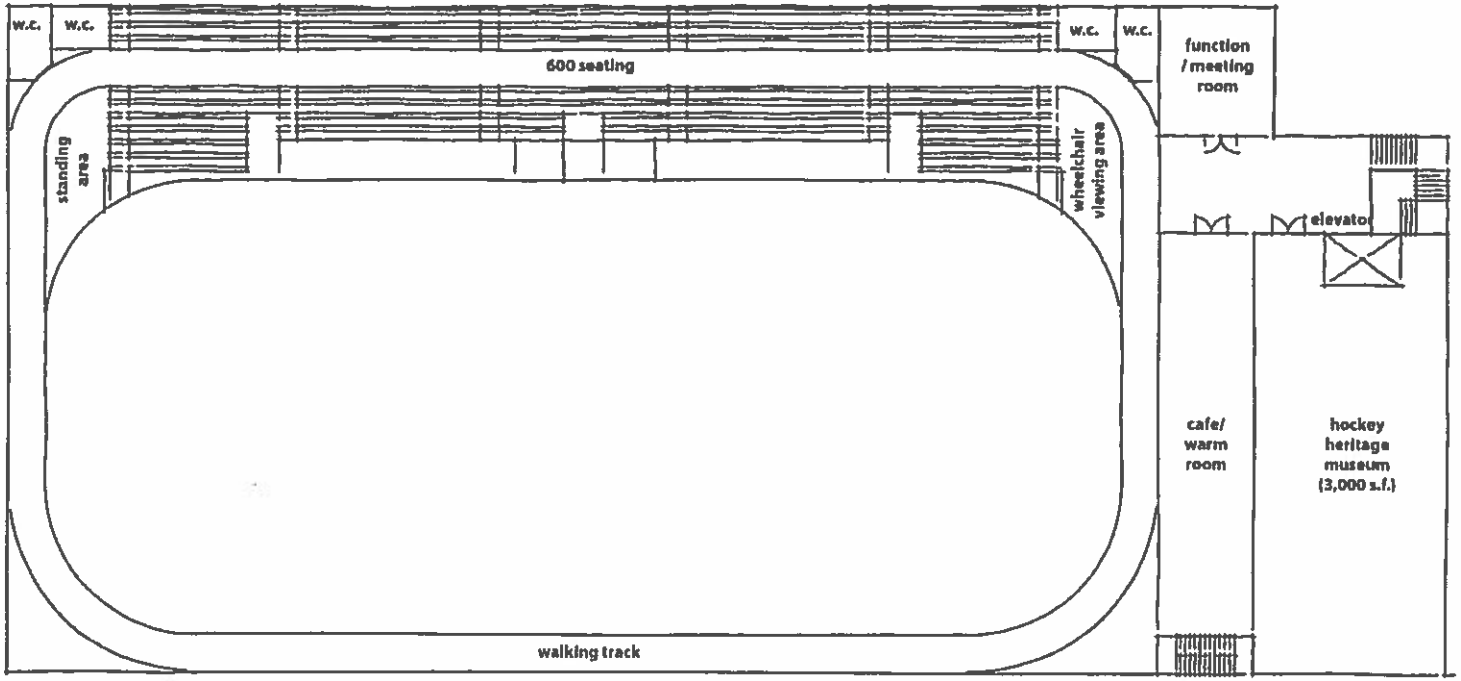
Proposed First Floor

Lindsay Construction
Project:
April 5, 2017

West Hants Heritage Center

Windsor, Nova Scotia

Lindsay CONSTRUCTION
BUILDING PARTNERS



Proposed Second Floor

Lindsay Construction
Project:
April 5, 2017

West Hants Heritage Center

Windsor, Nova Scotia

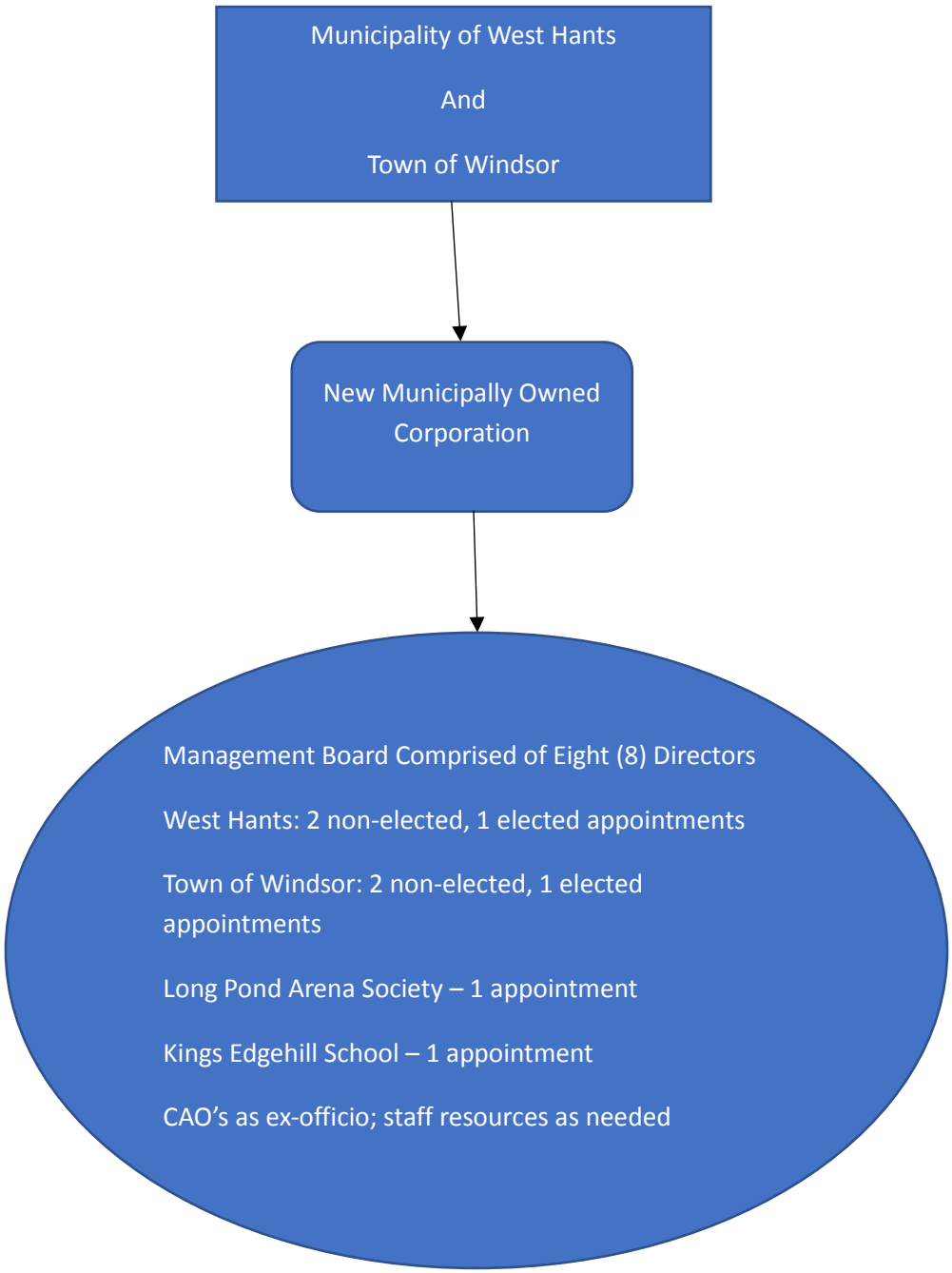
Lindsay CONSTRUCTION BUILDING PARTNERS

Appendix 6 – Governance Models for Both Facilities

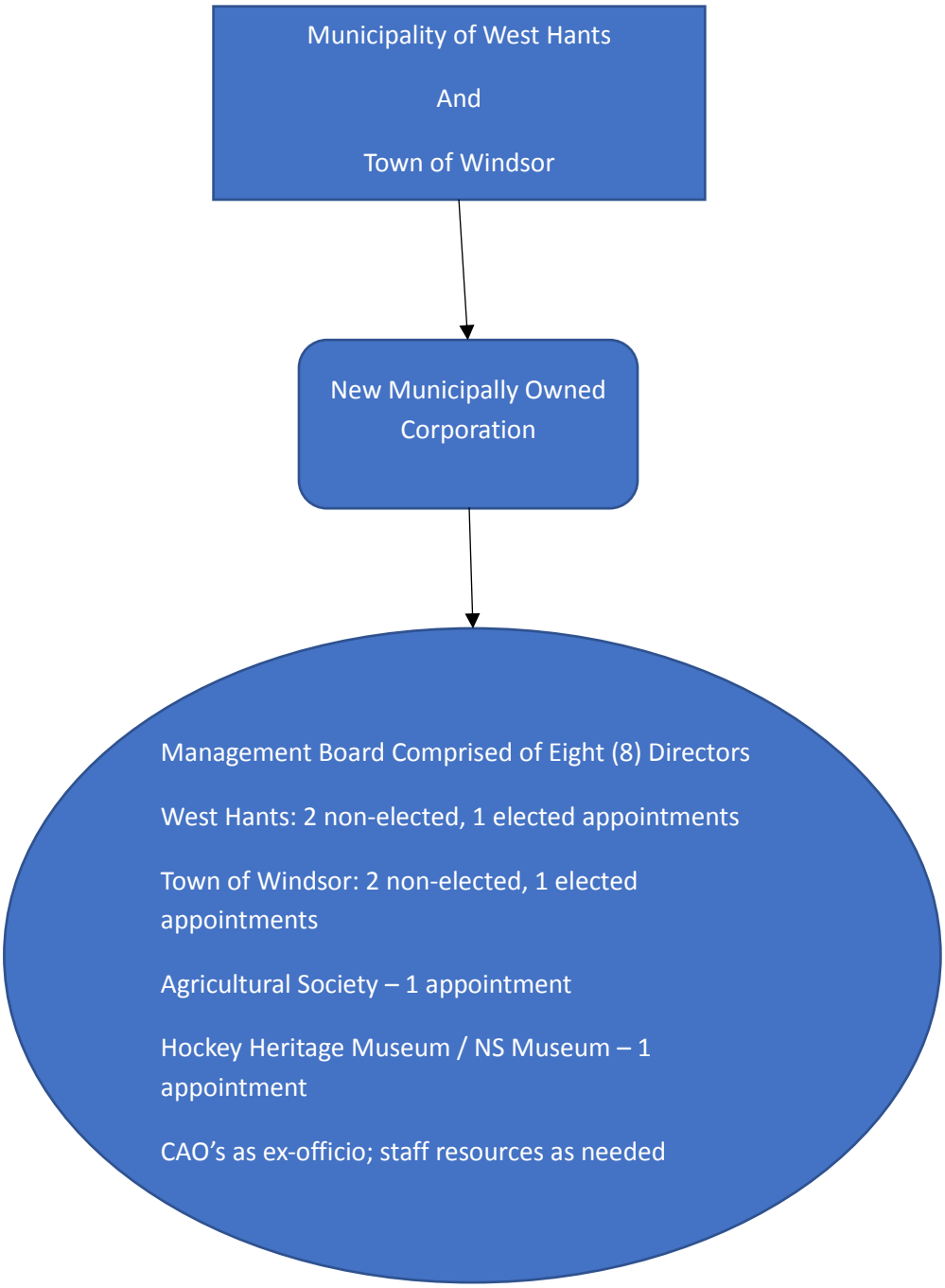
Hockey Heritage Corporation Governance Model:

Federal funding is contingent on the new facility being owned by one or both municipalities. Staff met with the Town of Windsor's municipal solicitor and reviewed of a number of ownership models for facilities located throughout Nova Scotia. Based on that discussion, and with support from the Long Pond Arena Society and Kings Edgehill School, staff are proposing the following governance model. (Also see Agricultural Society Proposal, over.)

Long Pond Proposal



Agricultural Society Proposal



Appendix 7 – Municipal Agreement (Long Pond Facility)

THIS INTER-MUNICIPAL SERVICE AGREEMENT to create a municipal body corporate known as the ***Hockey Heritage Municipal Corporation*** made this 26 day of April, 2017

BETWEEN

TOWN OF WINDSOR, a municipal body corporate, pursuant to the *Municipal Government Act*, S.N.S., 1998 chapter 18;

(hereinafter called "Windsor")

and

MUNICIPALITY OF THE DISTRICT OF WEST HANTS, a municipal body corporate, pursuant to the *Municipal Government Act*, S.N.S., 1998, chapter 18.

(hereinafter called "West Hants")

WHEREAS

A. The Councils of Windsor and of West Hants have recognized the benefits to their citizens of providing a variety of recreational opportunities;

B. The importance of hockey and other arena based activities have long been valued in the Windsor and West Hants region;

C. The Councils of Windsor and of West Hants wish to work cooperatively to help advance both the economic and health of the region as well as the health of their citizens;

D. Therefore, the Councils of Windsor and of West Hants have agreed that they wish to support the construction of an recreational and cultural facility to be located near Long Pond in the Town of Windsor;

E. Windsor and West Hants (referred to collectively as "the Municipal Units") will enter into an inter-municipal services agreement pursuant to section 60 the *Municipal Government Act* of Nova Scotia;

F. the Municipal Units wish to create a body corporate to provide for the design and construction of a Hockey Heritage Centre which may also house other recreational and cultural facilities;

G. The Municipal units wish the corporation being created by this Agreement to own and oversee the Hockey Heritage Centre;

H. The Councils of Windsor and West Hants also recognize the significant effort and expertise brought to this project by both the Long Pond Arena Society and Kings Edgehill School and wish to maintain the strong involvement of these bodies in the development, construction and operation of the Hockey Heritage Centre.

NOW THEREFORE in consideration of the mutual covenants and promises contained in this Agreement, the parties hereto agree as follows:

1. By this agreement the Municipal Units agree to create a municipal body corporate pursuant to section 60 of the Municipal Government Act, to be known as the Hockey Heritage Municipal Corporation (the "Municipal Corporation"), with constitutional documents consistent with the terms of this Agreement and with such other terms as may be mutually agreed

2. The effective date of section 1 of this agreement shall be upon its execution by both parties and the effective date of the remaining provisions shall be the incorporation date of the Municipal Corporation.

3. The Municipal Corporation shall be vested with the following powers:

   (a) the power to sue and be sued, to contract and be contracted with by its corporate name, to have a common seal and to alter or change it at pleasure, to have perpetual succession, to acquire and hold personal property or movables for the purposes for which the corporation is constituted and to alienate the same at pleasure;

   (b) the power to acquire, own, transfer, sell, lease, borrow and/or mortgage against real property;

   (c) the power to engage employees, agent or servants to conduct the objectives of the corporation;

   (d) the power to lease or sublease all or a portion of the Hockey Heritage Centre.

4. a) Any borrowings of the Municipal Corporation shall be guaranteed by the respective Municipal Units, proportionate to their vested interest in the corporation, which is a 50% undivided jointly held interest unless otherwise determined by agreement of the Municipal Units.

   b) Any borrowings and/or entering into debt obligations (including, but not limited to, mortgages and line of credit facilities) of the Municipal Corporation must be approved by each of the Municipal Units.

5. The Municipal Corporation shall operate on a not for profit basis.

Management Board

6. The management and administration of the Municipal Corporation shall be carried out under the jurisdiction of a Management Board, which shall consist of 8 members comprised as follows:

   (a) 3 representatives appointed by Windsor which shall consist of:
      a. 2 non-elected representatives
      b. 1 elected representative of Windsor council;

   (b) 3 representatives appointed by West Hants which shall consist of:
      a. 2 non-elected representatives
      b. 1 elected representative of West Hants council;

   (c) 1 representative appointed by the Long Pond Arena Society (the "Society");

(d) 1 representative appointed by Kings Edgehill School ("KES").

7. The term of office for the Management Board shall be as follows:

- Non-elected representatives will be appointed for a three year term, on a rotational basis.
- The initial appointments for non-elected representatives shall be as follows: each Municipal Unit shall appoint one non-elected representative for a two year term and one non-elected representative for a three year term or as determined by the Municipal Corporation to ensure a staggered approach to appointments.
- KES and the Society shall appoint their representatives for a three year term. .
- Non-elected representatives may be reappointed for a second consecutive three year term.
- Elected representatives shall be initially appointed for a two year term and may be reappointed for a second three year term. Successive terms for elected appointees will be for three years.
- Representatives who have served two terms will be permitted to serve again on the Management Board after a three year absence from the Board.

8. Appointments shall be effective for the beginning of a new fiscal period for the Municipal Corporation.

9. The Chief Administrative Officers and Recreation Directors for each Municipal Unit shall attend the Board Meetings as non-voting representatives. It is also acknowledged that the Management Board may require other parties, whether employees of the Municipal Units or otherwise, to attend Board Meetings for resource purposes, as deemed necessary by the Management Board.

Board Responsibilities

10. The Management Board shall establish its meeting procedures, Officers of the Board, voting procedures, and policies, which shall at the minimum be consistent with the *Municipal Government Act* and the constitutional documents of the Municipal Corporation.

11. Until such time as the Management Board is able to establish the above-noted procedures and policies, the Mayor and Warden and Chief Administrative Officer (CAO) of both Municipal Units shall conduct the day to day business affairs of the municipal body corporate, including but not limited to, jointly signing and executing all documents of a contractual nature, as reasonably required in the interim.

<u>Administration and Management of the Facility</u>

12. On behalf of Windsor and West Hants, and once the components, schematic design, and budget for the construction of the Hockey Heritage Centre and the Property have been approved by the Municipal Units in accordance with section 25 of this Agreement, the Management Board shall manage the construction, design and implementation phase of

the Hockey Heritage Centre to be located at a portion of the present PID: 45242096 and Assessment Account: 10128668 ("the Property").

13. The Management Board shall engage the services of a professional Project Manager to oversee the construction of the Hockey Heritage Centre on behalf of the Municipal Corporation.

14. On behalf of Windsor and West Hants, the Management Board shall have the exclusive right to manage the Hockey Heritage Centre and Property each year in the manner it deems best, provided it operates within the annual budget and the management plan as set out below. The Municipal Units, acting jointly may overrule the Management Board only with respect to bookings for the Hockey Heritage Centre which may offend the prevailing moral standards of the Community at the time.

15. Without limited the generality of the foregoing, and subject to the express terms of this Agreement, the administration and management by the Management Board shall include exclusive authority to make decision on all matters respecting implementation of the management plan, repair, facility upgrades, maintenance, use and activities.

Employer

16. The Municipal Corporation shall be considered the employer for the purpose of the administration and management of the Property and the Hockey Heritage Centre.

17. The Board, in conjunction with the Facility Manager, shall establish a Personnel Policy which shall establish the obligations and rights of both the employer and the employee and shall be consistent with the *Labour Standards Code* of Nova Scotia at a minimum.

Development and Recommendation of Budgets

18. The Management Board shall develop an Operating Budget and a Capital Budget and a Management Plan for the same fiscal year. After the first 5 years of operation, the annual Capital Budget shall be accompanied by a revolving three year Capital Expenditure Plan projecting future capital expenditures. The Management Plan shall identify the targeted outcomes and service adjustments.

19. Both the Operating and Capital Budgets and the associated Management Plan and, where applicable, the three year Capital Expenditure Plan shall be recommended to the two Municipal units for approval. Both Municipal Units shall be required to approve the Operating and Capital Budgets in order for the Operating and Capital Budget to take effect. The decision to approve the operating and Capital Budgets by both units shall be binding on both parties.

20. Until such time as the annual Operating Budget and the Management Plant are approved by both the Windsor and West Hants, it is agreed that the Operating Budget for the Management Board, and each party's financial contribution thereto, will be limited to the previous year's annual budget adjusted for any annual increases in the Nova Scotia Consumer Price Index and January 1 of each year, as published by Statistics Canada. During the 5 year period when federal funding is contingent on municipal ownership of the Property and Facility, the above provisions shall continue to be applicable until and unless an Operating Budget is approved by both Municipal Units.

21. Until such time as the annual Capital Budget is approved by both the Windsor and West Hants, there will be no Capital Budget from which to use funds for capital items. Pre-approval by both Municipal Units of capital items prior to budget approval will be required. During the 5 year period when federal funding is contingent on municipal ownership of the Property and Facility, and notwithstanding the preceding sentences of this section, each Municipal Unit shall be bound to approve capital items which are reasonably required to keep the facility operational. Thereafter, in the event of failure of both Municipal Units to approve an annual Capital Budget, each Municipal Unit shall be obligated to fund capital expenditures which have been included in a three year Capital Expenditure Plan which they have approved.

22. In the event that the Management Board finds that the Board will exceed or will likely exceed its approved budget as noted above, an additional budget appropriation must be submitted to the two Municipal Units for approval. For clarity, the Management Board shall not exceed either its Operating or Capital Budget without the express approval of the two Municipal Units.

23. The Management Board shall present the Municipal Units with an Operating Budget and Management Plan prior to February 28th, and a Capital Budget and, where applicable, a three year Capital Expenditure Plan prior to January 1st in the fiscal year preceding the fiscal year for which the Operating and Capital Budgets are proposed. A fiscal year shall commence on April 1 and end on March 31 of the following calendar year.

24. The Management Board shall provide quarterly written reports to the Municipal Units detailing the operational and capital position of the Arena facility.

Components, Design and Construction

25. Notwithstanding the above, the Management Board may make recommendations regarding the components, schematic design, and budget for the construction of the Hockey Heritage Centre and the Property, but such recommendations must be expressly approved by the two Municipal Units.

Policies and Procedures

26. The Management Board shall, from time to time, make such policies and rules of procedure for its efficient operation and management as it shall determine and shall provide copies of all such policies and rules to the Municipal Units once adopted by the Management Board.

Best Efforts for Economic Self-Sufficiency

27. The Management Board shall make best efforts to consider the interest of the citizens of both Municipal Units, as well as making best efforts to direct the Municipal Corporation toward economic self-sufficiency having regard to the role of the Hockey Heritage Centre as both a recreational facility and a means to support increased economic activity in the Windsor and West Hants region.

Insurance

28. The Municipal Corporation shall all times during the term of this Lease, and at its own cost, maintain insurance on the Property and the Hockey Heritage Centre, including all

equipment used in connection therewith, and shall ensure that Windsor and West Hants and its employees are identified as named insureds under all policies of insurance.

29. The policies of insurance for the Property and the Hockey Heritage Centre shall include:

    (A) all risks property insurance for the full replacement value of the Hockey Heritage Centre;

    (B) liability insurance with a minimum coverage of two million dollars per occurrence;

    (C) a business interruption endorsement;

    (D) a contractual liability endorsement;

    (E) all risks property insurance for the Municipal Corporation's fixtures and equipment;

30. All proceeds of insurance received by the Municipal Corporation as compensation for the total or partial destruction of the Facility shall be used solely for the repair or rebuilding of the Hockey Heritage Centre and said proceeds shall be held by the Municipal Corporation in trust for the Municipal Units and disbursed only upon their written consent.

Termination

31. Neither Municipal Unit shall terminate this agreement during the initial 5 year period when federal funding is contingent on municipal ownership of the Property and Facility. The Municipal Units acknowledge and agree that, should either unit terminate this agreement thereafter, that the departing unit or units must assume, among other items, its share of existing liabilities and operating deficits ;

32. The Municipal Units further acknowledge and agree that, should either or both units terminate this agreement, that the departing unit or units will also be liable to repay all federal, provincial, and municipal capital contributions which become repayable as a direct consequence of their departure and shall forfeit all future such contributions;

33. The Municipal Units further acknowledge and agree that should either (but not both) units terminate this agreement, that the departing unit will not receive any assets upon termination;

34. The Municipal Units further acknowledge and agree that should either (but not both) units wish to terminate this agreement, that the departing unit may be liable for future contributions towards the Facility pursuant to sections 20 and 21 consistent with any agreed to operational or capital funding commitments which exist at the time that notice of termination is given. The status of any such funding commitments or other dispute regarding amounts owed arising from termination shall be ultimately determined by agreement of the Municipal Units, failing which it shall be determined by a competent mediator or arbitrator appointed by the Municipal Units. Should the units not be able to agree upon a competent mediator and/or arbitrator, then the provisions of Article 38 below (regarding the Commercial Arbitration Act of Nova Scotia) shall apply;

35. The Municipal Units further acknowledge and agree that should either unit wish to terminate this agreement, a minimum of two years notice, delivered to the clerk of the other unit in writing, is required;

36. Notwithstanding any provisions contained herein to the contrary, the departing unit or units shall execute all subsequent instruments, deeds, documents of transfer of title, or any other document or legal thing necessary to effect the intended termination and/or dissolution of this agreement.

37. Any dispute or difference amongst the parties hereto in respect of the interpretation of this agreement shall be resolved and determined by arbitration in accordance with the provisions of the Commercial Arbitration Act of Nova Scotia.

38. This agreement may be amended from time to time by written agreement of all the parties.

This agreement shall be read with all changes of number and gender required by the context.

IN WITNESS WHEREOF the parties hereto have executed These Presents the day and year first above written.

SIGNED, SEALED AND DELIVERED
in the presence of:

MUNICIPALITY OF THE DISTRICT OF WEST HANTS

Witness — Per: Name

Witness — Per: Name

TOWN OF WINDSOR

Witness — Per:

Witness — Per:

3062691 v1

Appendix 8 – Land and Building Cost Comparisons

Land and Building Costs Comparison

Land costs and on-site servicing cost estimates are available, along with estimated building costs, at the Long Pond Site to provide a final estimated capital cost of the proposed facility. The Exhibition Site has proposed two main options: 1) a long term lease of land arrangement at a price to be independently determined and agreed upon, and which offers "to reduce the project's overall capital cost by removing the land cost component," or 2) an outright land purchase if the leasing option was unacceptable. In both cases (the price of the lease or the price of the land) has yet to be determined.

The Agricultural Society was not presently able to provide a cost for a 5-acre land purchase at Exhibition Site for the following reasons:

1) the site must first be selected – different parcels of land may have unique considerations concerning access/egress, landscaping and servicing, etc.
2) the site selected will require an independent appraisal, and
3) the sale of the site selected must be approved by a vote of the Agricultural Society Board of Directors.

As a result, direct comparison between the total cost of the Long Pond Site and the Exhibition Site is restricted to building, infrastructure costs and display costs. However, looking at the land purchase option in both cases, and assuming the cost of the two sites might be equal (i.e., the cost the land at the Exhibition Grounds Site would equal the cost of the land at the Long Pond Site) the up-front cost differences between the two sites (i.e., total building and servicing costs) are currently estimated as $900,000 in favour of the Exhibition Site.

<u>On-site Servicing Costs</u>

Expected $700,000 expenditure for flood protection at Exhibition Grounds site – see engineering report.

<u>Off-site Servicing Costs</u>

Expected $1.2 million expenditure for road up-grades for Long Pond site and $75,000 for water supply upgrade at Exhibition Grounds site – see Engineering Report.

<u>Site Capacity Considerations</u>

Capacity issues relate to final building size, parking, and overall design and layout. Present indications are that a 5-acre site will provide sufficient space for present planning purposes; however, future development requirements should be considered – see engineering report.

<u>Other Considerations</u>

Landscaping may be an additional cost at both sites; particularly the Exhibition Grounds site.

Appendix 9 – Traffic Capacity and Parking Analysis

Traffic Capacity Analysis

Maximum Museum Use Traffic Projection

Projected Maximum Visitation from Market Study - 10,000 visitors June-Sept (inclusive)

2/3 to arrive in July and August = 6,670 (ref: 2016 museum visitor statistics: 60% Haliburton House; 65% Atlantic Fisheries Museum)

Monthly traffic = 3,335/31 days = 108 visitors per day

2.4 visitors/car (ref: 2010 NS Visitor Exit Survey) = 44 cars/day (maximum)

Maximum Arena Use for Hockey and Other Activities

Expect Maple Leaf (Jr B) hockey crowds to reach 750 to 1,000 in play-offs 2-8 times per year.

High school tournaments, and potentially provincials for all levels of play, could also reach Jr B levels.

Concerts, figure skating, and other performances require space for larger crowds which is not currently available in the area.

Minimum recommended arena size seems to be 800/2.4 = 333 cars

Proposed Long Pond arena seating is 500/2.4 = 208 cars/day (full arena)

Traffic and Parking Analysis Summary

If the facility has 500-seating capacity (Long Pond Proposal), it appears that room for 208 parking spaces per day is the maximum the facility will need for arena and/or museum use. If the facility had 600 seats (Exhibition Site Proposal) it appears that parking would require a maximum of 250 spaces/day.

However, crowds of 800 to 1,000 have been reported for some hockey playoff games/tournaments, and may also be as large as this for some concerts or other events. If the facility allows standing room space (e.g., on the walking track for hockey games, or on the arena surface for concerts) there may be a need to allow for extra parking space.

Based on the need of 40 spaces for every 100 cars (i.e., an average of 2.4 persons per car), 1,000 visitors would require 400 parking spaces for both standing and seating space. The above analysis does not include space for performers, administration, policing, and other such vehicles that might attend large crowds – perhaps allow another 20 spaces.

Parking Lot Space Measurement

All measurements are in feet

24	18	18	24	18	18	24	Total 144 ft.

			Circulation			24
24	18	18	24	18	18	9
						9
						9
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						9
			Circulation			24

Total = 273 ft.

Parking Spaces are 9ft. * 18ft, and circulation space is 24ft.

Total space required for 100 cars is 144 * 273 = 39,312 sq. ft. or ~111 cars per acre.

https://www.reference.com/math/many-parking-spaces-can-fit-per-acre-5f0e49aad75a4b3a?qo=contentSimilarQuestions

The consultants have determined that about 0.7 acres[1] to 0.9 acres (shown above) of land is required for each 100 standard parking space sizes, depending on design and layout. Thus, 250 spaces would require a minimum of about 1.7 acres and a maximum of about 2.3 acres.

By way of comparison, the present arena has 125 paved parking spaces and is reported as occasionally requiring overflow space. However, there is considerable nearby parking space available at the present arena, and it is not known how much of this is used for overflow, or how often.

Taking all the above factors into consideration, the consultant recommends a minimum of 200 paved parking spaces be considered for a new facility with 500-seats and 250 paved spaces for a 600-seat facility, with an allowance for future expansion of 100 more spaces each, in case this is later required. The allowance for future parking space would suggest that at least 2.5 acres of a 5-acre site be reserved for parking on the Exhibition site and 2.2 acres at the Long Pond site.

The building size as presently conceived on both sites is estimated by the consultant as 34,000 sq. ft. (0.8 acres), leaving 1.7 acres for green space, future building expansion, or other use at the Exhibition site and about 2 acres at the Long Pond site. Presently, the access road proposed for the Long Pond site is believed to directly connect to the parking lot with an easement agreement over privately-owned land. Hence, the access road should not require any space on this 5-acre facility site. Should this change, the access road could constrain available parking or other space.

As all traffic at the Exhibition Grounds site is presently expected to enter and exit through a major intersection on Wentworth Rd., depending upon final purchase and/or leasing arrangements, an easement agreement for road access over Agricultural Society property may be necessary. This access road should also connect directly to the parking space and not further constrain available space.

[1] See parking design/layout for 250 cars in CBCL Engineering report, Appendix 2

Appendix 10 – Hockey Audiences Research

53% of Canadians are NHL Hockey fans; 13% of those are extreme fans who watch every game and know the stats; another 19% watch many games and know all the players. ***Forum Research Poll October, 2014***

'Are you an NHL hockey fan?

[All Respondents]

Age / Gender

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	1504	130	162	251	367	594	703	801
Yes	53	60	49	57	48	47	60	47
No	47	40	51	43	52	53	40	53

Region / Language

%	Total	Atl	Que	ON	Man/Sask	AB	BC	English	French
Sample	1504	79	397	530	110	162	226	1143	361
Yes	53	56	55	50	44	62	53	53	54
No	47	44	45	50	56	38	47	47	46

Federal Vote Preference

%	Total	Conservative	Liberal	NDP	Green	Bloc	Other Parties
Sample	1504	503	500	258	83	53	41
Yes	53	59	53	50	40	61	45
No	47	41	47	50	60	39	55

'How much of an NHL hockey fan are you?'

[NHL Hockey Fans]

Age / Gender

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	756	80	79	142	176	279	404	352
Extreme fan who watches every game possible and knows all the stats	13	18	7	14	10	8	15	10
Enthusiastic fan who watches many games and knows all the players	19	25	23	14	12	14	20	18
Regular fan who watches some games and knows all the rules	40	33	37	40	51	46	43	35
Part time fan who watches a few games and the playoffs	27	21	32	30	25	30	20	36
Something else	2	2	1	1	3	1	2	1

Region / Language

%	Total	Atl	Que	ON	Man/Sask	AB	BC	English	French
Sample	756	40	202	261	47	98	108	577	179
Extreme fan who watches every game possible and knows all the stats	13	19	11	17	3	6	9	13	13
Enthusiastic fan who watches many games and knows all the players	19	11	21	17	12	21	25	19	19
Regular fan who watches some games and knows all the rules	40	39	39	41	44	37	38	40	39
Part time fan who watches a few games and the playoffs	27	30	29	21	38	36	25	27	28
Something else	2	1	0	3	2	0	3	2	1

FORUM RESEARCH INC.

Methodology

The Forum Poll™ was conducted by Forum Research with the results based on an interactive voice response telephone survey of 1504 randomly selected Canadians 18 years of age or older. The poll was conducted on October 3-5th, 2014.

Results based on the total sample are considered accurate +/- 2.5%, 19 times out of 20. Subsample results will be less accurate. Margins of error for subsample (such as age, gender) results are available at www.forumresearch.com/samplestim.asp

Where appropriate, the data has been statistically weighted by age, region, and other variables to ensure that the sample reflects the actual population according to the latest Census data.

This research is not necessarily predictive of future outcomes, but rather, captures opinion at one point in time. Forum Research conducted this poll as a public service and to demonstrate our survey research capabilities. Forum houses its poll results in the Data Library of the Department of Political Science at the University of Toronto.

With offices across Canada and around the world, 100% Canadian-owned Forum Research is one of the country's leading survey research firms. This Forum Poll™and other polls may be found at Forum's poll archive at www.forumresearch.com/polls.asp

52% of Canadians believe hockey is either extremely important or very important to Canada's cultural and social fabric.

NEWS RELEASE

FORUM RESEARCH INC.

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TORONTO
October 6th, 2014

Hockey: Importance to Canada's Cultural and Social Fabric

'How important is hockey to Canada's cultural and social fabric?'

[All Respondents]

Age / Gender

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	1504	130	162	251	367	594	703	801
Extremely important	27	32	27	30	23	19	27	27
Very important	25	21	22	24	30	31	22	28
Important	30	32	29	29	27	32	29	30
Not that important	12	11	15	10	14	13	14	11
Not at all important	4	2	5	5	4	4	4	3
Don't know	2	3	2	3	2	2	3	2

Region / Language

%	Total	Atl	Que	ON	Man/Sask	AB	BC	English	French
Sample	1504	79	397	530	110	162	226	1143	361
Extremely important	27	23	20	31	18	31	31	29	18
Very important	25	28	29	24	25	20	23	24	29
Important	30	30	30	29	37	31	30	30	28
Not that important	12	13	12	12	17	12	10	11	15
Not at all important	4	3	5	3	3	3	4	3	5
Don't know	2	3	4	1	1	2	3	2	4

NHL Fan / Fan Level

%	Total	NHL FAN	Non-NHL FAN	Extreme fan	Enthusiastic fan	Regular fan	Part time fan	Something else
Sample	1504	756	748	76	118	333	217	12
Extremely important	27	38	14	68	60	35	17	10
Very important	25	30	19	17	29	31	36	14
Important	30	25	36	3	10	30	35	57
Not that important	12	5	20	10	1	3	9	11
Not at all important	4	1	7	1	0	1	0	0
Don't know	2	1	4	0	0	1	3	7

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Appendix 11 – Comparative Facilities

The Original Hockey Hall of Fame – Kingston, ON

See short video of the facility here.

The NHL founded the Hall of Fame in Kingston in 1943, but it was moved to Toronto in 1958. Now officially called the **International Hockey Hall of Fame (**since 2003) the Original Hockey Hall of Fame opened in 1965 is presently located at Kingston's Invista Centre, a four-pad arena complex on Gardiners Road with easy access to Highway 401." The former location was in a "decaying city-owned building in a mid-town residential neighbourhood, away from the tourist track on downtown Kingston." While the City of Kingston does not provide any direct monetary support; they do provide the current space at the arena "rent free." (1,500 sq. ft. plus theatre)

All four of the Centre's ice pads are NHL-sized and the dressing rooms enjoy radiant in-floor heating thanks to energy captured by this LEED®-standard building's rink-refrigeration systems. Admission charged at the older facility ($4-$5 adults and $12 family) generated about $3,000 to $5,000 per year; i.e., ~ 1,000 paid attendance ["nothing in winter"]). Admission is presently by donation and very small, but management believes a rink is the place to be.

The Hall operates year 'round, presently Thursday to Sunday only, from 12 noon to 6 pm. Unmanned, the hours are short to counter vandalism and capture weekend audiences in the Centre. They don't track viewership, but believe a rink venue increases traffic. Funding sources include donations and sponsorships; total admissions by donations are "weak." The facility makes some money on a lottery sold a local convenience store and funding programs such as golf tournaments. Looking to raise money on Corporate Hockey Tournaments ($3,000 - $4,000 per event). They currently do not have a gift shop because of space limitations, but had a gift shop in their former location. They would like to have a budget for one fulltime person to run the operation (incl: gift shop) and to increase promotion. Present display is by Show Communications (Kingston/ worldwide) cost ~$300,000, but the film presentation was minimum budget and gift narrated by Don Cherry. They feel they have a good web presence.

Discussions with management revealed that they consider themselves as the **birthplace of hockey** going back to an 1843 British soldier diary entry, now in the National Library of Canada (they have a mock-up). [Note: Kingston originally declared itself as the origin of hockey by reference to a recorded game between Queens University and the RMC played in 1886, but dropped this claim after finding Montreal teams had a game of record in 1875.]

Management also suggests Montreal is the home of "organized hockey," based on "Halifax Rules." They dismiss the Windsor claim as lacking firm evidence. Kingston has many hockey

firsts including original HOF inductions, connections to Stanley Cup, Memorial Cup and many players and unique artifacts. They report they don't get much support from either the NHL, the HHOF or the City of Kingston (latter focused on pushing it was the birthplace of Canada – 1st Capital.) The HHOF has occasionally loaned some artifacts (have huge amounts in storage) but only because of a personal relationship. "The HHOF generally seeks monetary transactions, not cross-promotion."

In February 2016, the facility unveiled new exhibits and a brand new look, opened the William J. Henderson Theatre and debuted the new Kingston hockey film ***"The Cradle of Hockey,"*** narrated by Don Cherry. The film runs continuously for visitors to the museum.

Exhibits are considered to Include "hockey's rarest and most unique artifacts… take a stroll through hockey history and **learn about the evolution of the game** and the prominent role Kingston has played in its development." https://www.youtube.com/watch?v=qbHMv-00ZGw&feature=youtu.be

Replica 1843 British soldier diary entry of playing "hockey" (1st time word used) in Kingston.

Also:
1. Original square hockey puck (1886)
2. Original historic hockey stick (1888)
3. Hockey's oldest jersey. 1894 Guy Curtis Queen's University.
4. Canada's First Olympic gold medal, 1924.
5. Gretzky's rookie jersey Edmonton Oilers WHA 1978-79
6. Original Calder Trophy for rookie of the year won by Syl Apps, 1936-37.
7. Maurice "Rocket" Richard Montreal Number "9" Montreal jersey
8. Gordie Howe Detroit Red Wings #9 jersey
9. Autographed Vladislav Tretiak goalie stick, 1972 Summit Series - Canada vs. Russia
10. 1948 RCAF Canadian Olympic jersey (gold medal winning team).

.

The Canadian Baseball Hall of Fame and Museum (CBHF) – St. Mary's, ON (about 100 km west of Kitchener, 2-hour drive from Toronto)

Induction Day
Simon Sharkey-Gotlieb/Toronto Observer

Open from May to mid-October and museum attracts 3,000 – 4,000 visitors each season, plus some group tours in winter. Admission fees average about $6 PP, suggesting admission revenues in the range of $15,000. The museum also sells ~400 memberships per year at various price levels, verbally reported as averaging about $65, suggesting another $26,000 in sales (these also entitle people to various benefits, including autographs at induction ceremonies). Merchandise sales are another major source of income ("visitors walk through the retail shop both entering and leaving"). T-shirts and hats are biggest sales. The operation is reported to receive some financial support for its inductee program from the Toronto Blue Jays organization.

According to Director, Scott Crawford, the CBHF fights to maintain a budget of $350,000 per year by raising money through a number of small sources. These include:

- admission fees
- donations
- memberships
- sponsorships
- retail store sales
- renting their four ball parks
- golf tournaments
- lottery sales
- sales of the Induction Day program (generates $30,000)
- The Blue Jays organization and the Town "help out a bit"
- other "in-kind" support

He views awareness and promotion of the operation as its greatest challenge. Primarily they rely on social media (FB, Twitter, and social instagrams). They have a sign on the highway and they also get a little boost from free media promotions. "Getting awareness takes a long time."

Space is about 2,000 sq. ft., with about 1,000 sq. ft. of exhibition space. Visitors are mostly Expo fans from Toronto (~80%). The Blue Jays exhibit is greatest draw, especially for younger players; also various trophies and World Series home plates. They have no interactive games or simulators at present. Older visitors enjoy displays of the old favourites, such as Babe Ruth.

“The museum contains artifacts from all over the world and displays many of them on a rotation basis, with approximately 33 percent of the collection on display at any one time. Permanent displays include a room dedicated to the Toronto Blue Jays and the Montreal Expos as well as a room dedicated to current and recent major league players who hail from Canada.” Also contains information on “(Fergie Jenkins, a courageous, black man who overcame seemingly insurmountable odds to become one of the most dominant major league pitchers of his era and a team of Japanese Canadians who won five Pacific Northwest Championships before being interned during World War II.)” “If you are interested in current Canadian-born big leaguers such as Brett Lawrie, John Axford, Justin Morneau, Russell Martin, Michael Saunders, Jim Henderson, James Paxton and Joey Votto, they are also well represented in the museum.”

“In the area four ballfields are used for over 950 events each year and can be rented throughout the year. The area is home to the St. Marys Minor Ball, St. Marys Slo-pitch, Ontario Nationals, Ontario Expos and play host to teams from Quebec, the PBLO, CPBL, London Men’s League, London Badgers and many others.”

“(The future) vision for the site includes an education centre, walking trails, picnic grounds, a new museum, and a stadium.”

The Hall of Fame is located in St. Marys for two main reasons. “The first being the historic reference to the first recorded game of baseball in North America. It took place in Beachville, Ontario (30 minutes south of St. Marys) on June 4, 1838 and was written about by St. Marys native Adam Ford in the 1886 Sporting Life magazine. (Secondly) is the donation of 32 acres of land by the St. Marys Cement Company. Also, a local firm called the St. Marys Wood Specialty Company added the production of baseball bats to its production line at the turn of the 20th century and the wood company stayed in St. Marys until 1933.”

US Hockey Hall of Fame Museum, Eveleth, Minnesota, USA

http://www.ushockeyhall.com/home See 2 min. video here.

The 3-floor museum located in Eveleth, Minnesota, 3 hours north of Minneapolis, opened in 1973 and closed its doors in 2006, but was resurrected the next year in an agreement with USA Hockey. A discussion with a staff member indicated that no attendance records are currently collected, but estimated 40 visitors per day over the summer. Attendance drops off in the winter to 8-10 per day (weekends) except when hockey games/tournaments are scheduled locally that can bring in dozens of team members and guests. Through discussion with staff, the consultant estimates total visitation is in the range of 7,000 to 8,000 per year.

> (2006) "The U.S. Hockey Hall of Fame, a shrine for stars from all levels of American hockey and a mainstay in this Iron Range town for three decades, has closed its doors… The museum has struggled financially since opening in 1972. It costs about $11,000 per month to keep it operating, said executive director Tom Sersha. Sitting along U.S. Highway 53, the hall attracts about 10,000 visitors per year, but it would take about 30,000 visitors each year to keep the museum afloat, officials said." (Source: http://www.espn.com/nhl/news/story?id=2445550)
>
> "In May 2007, an agreement between the Hall and USA Hockey was established whereas USA Hockey will take over the Induction process and the Hall's official name will now become the 'United States Hockey Hall of Fame Museum'." (Source: http://www.ushockeyhallmuseum.com/)

Management has referred to Eveleth as the "Birthplace of American Hockey."

Memorial Day Weekend through Labor Day
Mon - Sat: 9:00 - 5:00
Sun: 10:00 - 3:00
Labor Day weekend through Memorial Day
Fri: 10:00 - 5:00
Sat: 9:00 - 5:00
Sun: 10:00 - 3:00

Admission Rates
Adults (18+) - $8.00
Seniors (55+) - $7.00
Juniors (13-17) - $7.00
Children (6-12) - $6.00
Under 6 - Free

Nova Scotia Sport Hall of Fame – Features Sidney Crosby Exhibit and Hockey

http://www.novascotiasporthalloffame.com/

1. Estimated 60,000 to 70,000 visitors total per year – most in winter time before scheduled events
2. Summer ~100 visitors per day, depending on cruise ships and bus tours
3. Summer estimated ~10 out-of-province visitors per day when cruises/bus tours are here
4. Summer estimated 2-3 out-of-province visitors per day when no cruises/bus tours
5. Sidney Crosby is big draw (~ 25% of exhibit space) – donated his materials to NSSHF
6. The hockey theme in total, with a Pittsburgh Penguins' Stanley Cup film on large screen (including seating space), and a hockey simulator game, might take up 50% or more of total exhibit space (consultant estimate)
7. Pittsburg Penguins organization also helped-out with displays
8. Originally planned as a temporary exhibit, but no plans to close
9. The Crosby exhibit has received attention from media across North America

- Fans of Sidney Crosby flock to Halifax museum to celebrate...
- Crosby fans celebrate Cup win with pilgrimage to famous dryer ...
- A shrine to Sidney Crosby in Halifax | Pittsburgh Post-Gazette
- In Pictures: Halifax home to popular Sidney Crosby exhibit | CTV...
- Sidney Crosby exhibit in Halifax too popular to close - NHL on...
- Nova Scotia Sport Hall of Fame (Halifax) - All You Need to Know...
- https://www.tripadvisor.ca/LocationPhotoDirectLink-g154976-d2267916-i148996582- Sidney Crosby's Dryer - Picture of Nova Scotia Sport ... - ...

Canada' Sports Hall of Fame - also has a Hockey Gallery

Hockey Gallery

"This sacred space will showcase the best of Canada's game – HOCKEY. Visitors will get the feel for the ice rink, the arena and the pond with amazing display items, and can get into the game by tending goal and taking shots during an NHL team practice at the BE A GOALIE IN 3D interactive.

Be inspired by artefacts from hockey pioneers Cassie Campbell and Angela James and legends Mario Lemieux and Bobby Hull. Marvel at the video that talks about Jacques Plante's goalie mask. See a part of Canadian hockey history as legendary broadcaster Foster Hewitt's Hockey Night in Canada microphone is on display."

OTHER - MOBILE AND TEMPORARY EXHIBITS

The Hockey Hall of Fame features a number of travelling exhibits that can be tailored to any size, theme and budget.

"The Original" Hockey Hall of Fame mobile Legend's Exhibit features 12 unique showcases that are complimented by a graphic component and has been designed for set-up versatility. In use since 1998, the exhibit system has travel from coast-to-coast across North America and has been a fan favourite wherever it goes." $1,250/day

The largest outreach exhibit system, is 2,000 square foot display that showcases great players. $2,599/day

Various photo, art and video exhibitions are available from $250 to $599/day

The Canadian Museum of History (temporary hockey exhibit, but may be passed on to other exhibitions)

http://www.historymuseum.ca/

http://www.historymuseum.ca/hockey/?date=2017-08-10

http://www.cbc.ca/news/canada/ottawa/canadian-history-museum-hockey-exhibit-2017-1.3994207

https://passport2017.ca/articles/hockey-matters

http://ottawacitizen.com/entertainment/local-arts/rarely-seen-national-treasures-on-display-at-new-hockey-museum-exhibit

Includes:

1. Paul Henderson's game jersey from the 1972 Summit Series against the Soviets ("a quintessential hockey moment in time," Anderson said).

2. The Sidney Crosby jersey he wore while scoring the Golden Goal at the Vancouver 2010 Olympics.

3. Hayley Wickenheiser's jersey and skates, representing not only her place as a dominant player but also in advancing the sport of women's hockey.

4. Earliest hockey stick (from Cape Breton)

Appendix 12 – Cooperstown and Hockey HOFM Models

Cooperstown Baseball Hall of Fame (HOF)– Upper New York State

See 5-min video here.

Yearly attendance is generally reported as 250,000 – to 300,000, (260,000 in 2013 – see https://www.wsj.com/articles/SB10001424127887323740804578597831168128850) and is known to vary relating to the success of the "Induction Weekend" festivities that can account for up to 20% of yearly attendance. Major 2013 revenue sources included $3 million in admissions, $1.5 million in membership sales, $3.7 million in various grants, and 1 $ million in inventory sales (net). The operation spent $122,000 in advertising and promotion in 2013. (source: US IRA form 990).

Features more than 60,000 square feet of exhibit space. A two-year, $20 million renovation of the museum was completed in 2005.

"In the Museum's exhibits, you can learn about baseball history, see thousands of artifacts from the game's past, watch video, hear audio, see historic images, enjoy hands-on learning, delve deeper with computer interactive displays and test your baseball knowledge."

> Cooperstown Room - examines the history of the Hall of Fame and the "Home of Baseball," Cooperstown, N.Y. See: the mythical "Doubleday Ball."
>
> Taking the Field: The 19th Century - Featuring baseball's formative beginnings, it is an engaging interpretation of baseball's early years. See: the oldest known baseball jersey.
>
> 20th Century Baseball Time Line - details baseball's notable players, legendary teams and historic moments, including special exhibit space given to important stories including:
>
> Babe Ruth: His Life and Legend - Ruth's earliest days to his peak as a player and
>
> Diamond Dreams: Women in Baseball - This space salutes the roles women have played in baseball at every level.
>
> Pride and Passion: The African-American Baseball Experience
>
> ¡Viva Baseball! - Opened in 2009, this interactive exhibit is dedicated to baseball in the Caribbean Basin countries.

Today's Game - Capturing memories and milestones from the last several years, it features a locker containing recent artifacts for each of the 30 major league teams and a display with items from the most recent baseball season.

Diamond Mines - Telling the story of baseball scouts.

Sacred Ground - Examining ballparks of the past and present, this exhibit takes a look at America's cathedrals of the game.

Hank Aaron: Chasing the Dream - chronicles Aaron's life, from childhood through his big league career and post-baseball activities.

One for the Books - delves into stories behind historic events and gives visitors an interactive look at the National Pastime's most indelible moments.

Autumn Glory: Postseason Celebration - View artifacts from the most recent World Series and rings from championship teams through the years, and interact with video highlights from memorable World Series moments.

Picturing America's Pastime (temporary exhibit) - The Museum preserves more than 250,000 original photographs in the Museum's photo archive.

The New Face of Baseball - Osvaldo Salas's American Baseball Photographs (temporary exhibit) - The exhibition features the American baseball photographs of the internationally-acclaimed Cuban photojournalist Osvaldo Salas (1914-1992). Chasing the Dream contains Hank Aaron's uniform from the game in which he hit his record breaking 715th career home run and his locker from Fulton-County Stadium. (Milo Stewart Jr./National Baseball Hall of Fame)

Learning Center - This space is used for education based programming, including hands-on learning and special events. Information for programs going on can be found on information screens in the Museum lobby.

Buck O'Neil Lifetime Achievement Award - named after the first winner, the Negro Leagues legend whose baseball contributions spanned eight decades.

Art of Baseball - The sport is an inspiration for many creative outlets, some of which have made their way to Cooperstown.

Hall of Fame Plaque Gallery - This is where all the bronze plaques for the more than 300 Hall of Famers are housed.

Baseball at the Movies - Hollywood's fascination with baseball has been captured in hundreds of films.

Scribes and Mikemen - Honors the greatest journalists to broadcast and write about the national pastime.

Bullpen Theater - Public programs of all sorts and other activities are held in this special presentation space with vast multimedia capabilities.

Sandlot Kids' Clubhouse - Designed with children in mind, there are plenty of activities for young baseball fans.

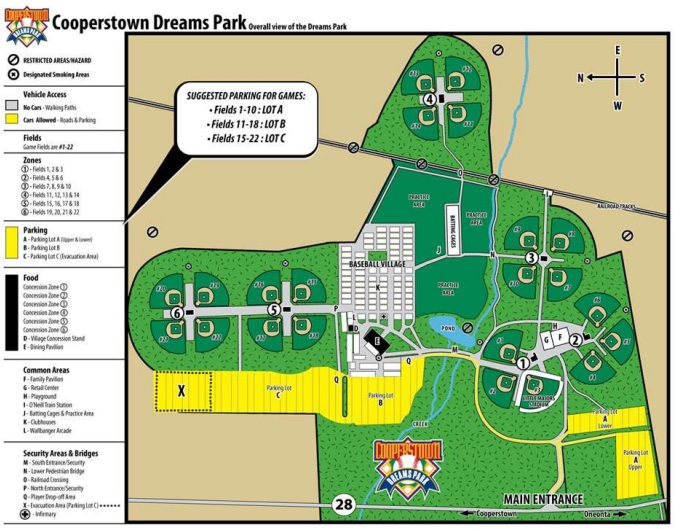
Giamatti Research Center - Where the Baseball Hall of Fame can help you learn more about the game.

"Our overall rating for the National Baseball Hall of Fame – it's the finest attraction of its type in North America, surpassing every other sporting museum by a quantum leap. We would go back again in a heartbeat, and enjoy every minute even more than the first trip."

RV Lifestyle: https://rvlifemag.com/the-national-baseball-hall-of-fame-and-museum/

Other Area Attractions

Cooperstown Dreams Park (CDP)



Among the 3 major tournament operators (Cooperstown Dreams Park [CDP], Cooperstown Baseball World [CBW], and All-Star Village), the researchers counted 38 ball fields. CDP is the largest with 22 fields. The fields are in use throughout the day, and even under lights, by multiple teams – approximately 150 per week, each with a minimum of 13 members. Together, the fields attract an estimated 50,000 – 75,000 visitors each summer (~20,000 families and friends also attend youth baseball training camps) including visits to the Baseball Hall of Fame.

Cooperstown Dreams Park
The Farmers' Museum
Fenimore Art Museum
Glimmerglass Opera
Hyde Hall Historic Site
Cooperstown Chamber Music Festival
Brewery Ommegang
Glimmerglass State Park

Cooperstown HOFM – Some Comments on Trip Advisor (exceptions to generally positive comments)

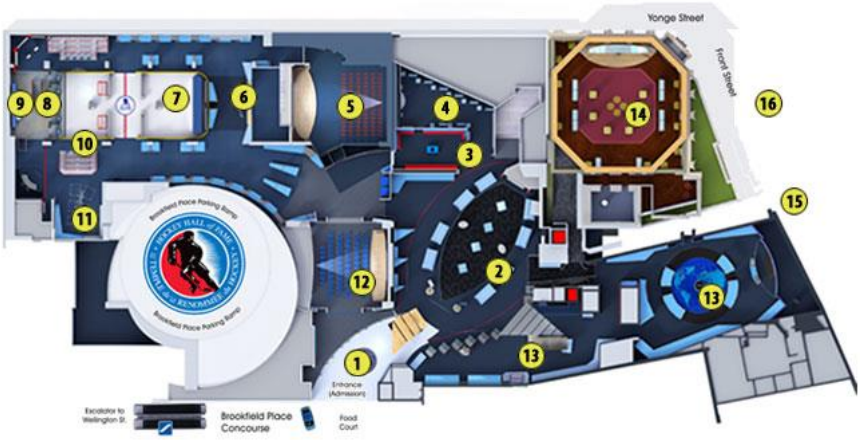
- Great word of mouth – trip advisor 95% of 2,786 reviews rated it excellent (79%) or very good (16%) with only 2% poor or terrible ratings
- Major Draws: Babe Ruth and bucket list (check-off)
- If you really like the Yankees and the Red Sox and Babe Ruth, then you'll be in heaven. but I felt it to be an overload of New York and Boston. I sort of got tired of looking at items in glass displays - one after another after another! The best part is really just the actual Hall of Fame itself. It's well done with all the plaques on the wall.
- It feels like the curator has thrown incredibly historic items behind some glass and stuck some labels on everything. There's no story. No interactive elements. It's on level with zoos of yesteryear where the animals were behind bars doing nothing. The flow was nonexistent … everything felt like an after-thought.
- Would have liked to see more on Lou Gehrig, Pete Rose "fall from fame", disappointed to see the issue of drug/steroid not highlighted.
- We expected to see more larger displays and life size models of players, along with uniforms and models with their uniforms.
- The section for women seems very off center, part of, but not included with the rest of the mix.
- The Babe Ruth exhibit was fantastic. I found that there was too much attention on baseball-related events and artifacts rather than baseball teams, players and "historic" games.
- The museum is arranged in a rather hodge podge manner. The flow of the displays needs to be totally reworked.
- If you are in the area or do not mind driving a few hours, then it is worth the trip. If you are further away just be prepared for an okay experience.

Hockey Hall of Fame and Museum (HHOFM)

See a 15-min video of the facility here.

HHOFM is located at the corner of Yonge and Front St., in downtown Toronto, considered Canada's busiest transport hub (e.g., Union Station, Toronto Islands, CN Tower, Harbour Front Centre, Air Canada Centre) ~200,000-250,000 paid visitors yearly (MRA est.), cost $27 million (1993) and a $12 million exhibit renovations project between 2000-2006. Partner with the Seaman Hockey Resource Centre. Major sponsors include ESSO, Scotiabank, Honda, Via Rail, Tim Hortons, TSN) – rated 11th of 500 TO attractions by Trip Advisor. The operation spent $911,000 on marketing and promotion in 2015, up from $795,000 in 2014.

2015 revenue base of ~$15 million. Sources: retail 25%, meetings & events facility sales 20%, admission fees 19%, licensing 18%, sponsorships 10%, induction & misc. 7%. Revenues, net of direct (revenue-generating) expenses, are ~$8.2 million, with admission fees (not including staffing and other overhead costs) accounting for almost 35% of the total. Various overhead costs, including staffing, promotion and building costs (amortization) total ~$7.5 million, leaving a surplus of ~$750,000 in 2015. Not-for-profit organization with 60,000 sq. ft. of exhibit space.



1. Entrance Foyer Displays
2. Honda NHL Zone
3. Canadiens Dressing Room
4. Via Rail Stanley Cup Dynasties
10. Shoot for a Cure Slapshot Trivia
11. Upper Deck Collectors' Corner
12. Tim Hortons Theatre
13. Tissot World of Hockey

5. TSN Theatre (3-D movie)
6. Scotiabank Hometown Hockey
7. NHLPA Game Time
8. TSN/RDS Broadcast Zone
9. EA Sports NHL15 / PS4 Game Kiosks
14. Esso Great Hall & NHL Trophies
15. Spirit of Hockey Retail Store
16. Exterior Sculptures
D.K. (Doc) Seaman Hockey Resource Centre

The Hockey Hall of Fame and Museum exists to honour and preserve the history of the game of ice hockey and, in particular, those who have made outstanding contributions and achievements in the development of the game. "HHFM will collect, preserve, research, exhibit and promote all those objects, images and histories which are determined to be significant to the story of ice hockey in Canada, and throughout the world. HHOFM will carry out its exhibition activities both in its facility at Brookfield Place (formerly BCE Place), Toronto and whenever permissible through outreach programs."

HHOFM works with the Professional Hockey Writers' Association and NHL Broadcasters' Association to recognize distinguished individuals from the print and broadcast media professions.

HHOFM also acts as the principal facility for research into the history of hockey.

Summary - Hockey Hall of Fame and Museum (HHOFM)

- no major competition (in exhibits, inductions)
- 60,000 sq. ft. of exhibit space
- $ multi-million displays
- induction day ceremonies are big draw
- large promotion budget (~$1 million)
- backed by NHL and major sponsors
- located in a large population centre (significant more travelling public)

Result: 200,000 – 250,000 visits to Museum in 2016 (**present actual market demand**).
The market magnitude ratio here may be somewhat similar to Baseball Hall of Fame as the HHOF draws from Upper Canada and a large portion of the Northeast US population. (Many US visitor commentaries on the HHOF can be seen registered on the Trip Advisor website.)

**

HHOFM - major attractions (Trip Advisor): Star players / Induction day, Stanley Cup (touch and picture with), interactive games, trophy room

Some Comments on Trip Advisor (exceptions to generally positive comments)

- Very Good word of mouth – trip advisor 90% of 3,059 reviews rated it excellent (59%) or very good (31%), with no poor or terrible ratings – however, **many visitors think it is poorly done – see below:**
- Lacking info on minor league hockey, college teams, etc., does little to educate or engage the novice. There could be more done to explain the game to the uninitiated, need more interactive,

- There are no themed exhibits on the real history of hockey. It is assumed all guests are super fans and enjoy memorabilia and Cups and fun kid-friendly shoot outs and a do-your-own Sports Centre report. I wanted more- where was the Gordie Howe exhibit? Where were the teams of yesterday and today? Why just one Hartford Whalers nod? Hockey is an exciting sport that is gaining fans worldwide. Yet this small HOF is clobbered by Cooperstown for a sport few outside the Americas care about. Time to rethink the HHOF and do more for the $20 admission
- Search for a coupon online - we found a $4 off per person so it came out to $14 each person vs. $18 per person which still is a bit much
- My real problem with this place is that I went to be educated but there really is not any good explanation of what you are looking at.
- I was expecting something more like the Baseball Hall of Fame where you really learn about the sport and the players. This was one big marketing experience with every room promoting some company or other. I am a huge hockey fan and was pretty disappointed. They did give a fair amount of attention to women's hockey, and as a former women's player I was pleased by that.
- Maybe more photos?
- It would have been nice to have a film on the history of hockey and also a film on greatest moments. The placards are small in exhibits and don't tell stories, just a lot of statistics.
- The HHOF would benefit from adding more stations / activities that are more active.
- You can only look at so many old hockey gloves, sticks, pucks etc...
- the lack of video at this museum was shocking.
- HOF hasn’t aged well. As a kid I thought it was great, as an adult I found it very boring.
- I'd have preferred full-on displays for at least the majority of inductees.
- this is for the Legends of the game and I didn't really feel that they highlighted that aspect. They got more into the minutia of the game, the stuff that the hardcore would be thrilled with, but is lost on the casual fan.
- disorganized and more Canada-based than the expected NHL (US visitor)
- It's not Cooperstown. Located in the basement level of Class A office space, the Hockey Hall of Fame was largely underwhelming. How can one of the greatest players (Steve Yzerman) to ever strap on skates, the 6th leading scorer in NHL history and a 3 time Stanley Cup winner be relegated to a corner. The rest of the Hall consisted of some pictures of inductees, an interactive area and a disproportionately large exhibit on international hockey (US visitor).
- Paying $18 to look at jerseys hockey sticks and pucks wasn't all that fascinating and then having to pay 11 bucks for parking didn't help.
- The 3D movie might be the worst film of all time.
- My kids (ages 7 & 10) started skipping some of the displays because they were classic museum displays. The kids did enjoy the interactive activities.
- disappointed - if you are an American fan of hockey, be prepared, this museum is 80% Canadian, 10% American and 10% international hockey.
- fairly underwhelming. After a while (about 10 minutes) jerseys and sticks starts getting old. The 3D movie was about 5 times too long. (Vancouver)
- Not for kids
- Mishmash and trivia
- 90% NHL

One Person's Longer Comment (Poor Man's Cooperstown Old-eye)

Too commercialized, not enough history - Considering the storied past of professional hockey, it is a sport that is steeped in history and rivals the same nostalgia and folklore to Canadians as baseball does for the U.S. In comparison to the other big three pro sports in North America (Baseball, Football and Basketball) hockey is one of the oldest and the NHL is next only to baseball with regards to the time of its origin. Both games saw their early beginnings as professional leagues during the golden age of sport, in the late teens after the Great War, and really began to flourish during the 1920s. Both leagues have a rich history of personalities who not only played the games, but helped build the sports and make them what they are today.

With this in mind, it's disappointing that the powers that be opted to place the Hockey Hall of Fame in the concourse of a high end underground mall adjacent to a food court at the end of the financial district and surrounded by big, bright, shiny new buildings amidst a sea of post modernist glass and steel offices. Hardly a homage to the games history or storied past. I went to Cooperstown many years ago as a young man on a road trip with friends back in my university days. The baseball hall of fame is in a tiny town in New York State that is supposedly the location of where future Union general, Abner Doubleday, invented the sport of baseball in the 1830s. To go there is an experience, not a two hour visit. The folklore and mythology of the sport of baseball is celebrated and revered across America and the entire town is a living museum devoted to that sport. Baseball fans from around the world flock to the tiny town year after year during the hall of fame inaugurations and make a pilgrimage to the sports Mecca to participate in baseball tourneys and games throughout the summer.

To be inducted into the sacred hall of fame, nominees have to meet a number of strict criteria and even perennial all-stars with long careers and multiple championships or awards are sometimes deemed not worthy enough to enter. Very different from the hockey hall of fame where apparently all you need to get in was have a cup of coffee in the NHL or drive a Zamboni to get you in under some random category. The HHOF is not very discerning and to become a member doesn't make you necessarily part of an exclusive club.

I have never been to Canton or Springfield to visit either the Basketball or Football Hall of Fames. But I do know that both of them are not located in large metropolitan cities and are not swallowed up by other tourist attractions or thrust against the backdrop of a busy, bustling city. When people go to those towns, they are there specifically for the Hall of Fame which is why they are places which are held in such high regard and with great reverence and respect. They are not merely dusty, old museums, but rather the living breathing hearts of their respective sports.

The HHOF is none of that but instead a commercialized, flashy mall and tacky gift shop more intent on selling a marketable image than paying homage to the sports history and roots. There are interactive games and activities for visitors to come play more reminiscent of an arcade where you get tickets for playing skeeball than a Hall of Fame.

The one cool thing is that the Hall actually leads into the old Bank of Montreal Building (the one throwback to days gone by) where they keep the original Stanley Cup housed in the old vault. The layout

is great and visitors will go through exhibits that span two floors and will take you through a replica of the Montreal Canadians dressing room. It shouldn't take one more than a couple hours to get through the whole thing and that is with taking a turn wiring slap shots against an interactive video of a real NHL goalie or playing goal to try to stop a flurry of sponge pucks. It ends in the gift shop where you can purchase a bunch of overpriced jerseys and other NHL inspired paraphernalia.

Overall, more attention should be paid to maintaining the history of the sport and making it a true Mecca to the actual sport. If the league wants to keep it in Toronto, than move it to the old Maple Leaf Gardens building up the street which has since become a grocery store. Given Toronto hasn't actually won a cup since 1967, it's hard to argue that it's a city with a rich hockey tradition. The Air Canada Centre (ACC) continues to sell out every year to casual fans who are more corporate suits who bring clients to games as a status symbol because they are the only ones who can actually afford tickets. It's only recently that the Maple Leaf organization has put a competitive team on the ice that are actually worth watching. As much as it pains me to say this as a life long, suffering Leafs fan, they could pack the whole HHOF up and move it to Montreal where supposedly the indoor game was first played and the replica Habs changeroom would be more appropriate considering they are the most winningest team with the most Stanley Cup titles in the rich history of the sport. Ticket prices are comparable to other museums and run about $18 per adult.

Appendix 13 – Hockey Schools and Camps Research

Atlantic Canada Hockey Schools and Camps

Andrews Hockey Program (AHP)

Operating for more than 30 years in Atlantic Canada, Andrews Hockey has established a major, as well as international, reputation for its training schools and tournaments. Based in Charlottetown, PEI, they operate out of the Bell Aliant Centre that features 2 NHL-sized ice surfaces (one with 1,400 seating and the second with 400 seating), 13 dressing rooms; in a complex that includes an aquatics facility and the UPEI Fitness Centre (weight room, aerobics room, walking track, squash courts and Physiotherapy Clinic). The facility is surrounded by 3 more arenas in the immediate area.

Andrews Hockey boasts an internally-recognized training program, "Considered by hockey experts to be the most advanced Scientific-Based Skating Program in Present Day Hockey," that has sent 35 players to the NHL, including Sidney Crosby (attended for 10 years) and 15 players from PEI alone. Many more are in other leagues. It has 26 staff, not including office personnel and provides a coach to player ratio of 1:5. Their various training programs and tournaments bring "Scouts, coaches and recruiters from U.S. colleges, U.S. prep schools, Canadian prep schools, Canadian Major Junior, Tier II Junior, Tier III Junior, Canadian universities (as well as) NHL organizations."

An offshoot of the operation, East Coast Ice, conducts satellite training camps and tournaments throughout the Maritime Provinces at various locations throughout the year.

MRA researched the ice time involved in the AHP program at their 2 home arenas in Charlottetown and found that most of their training programs in 2016-17 were conducted from June 20 through to September 1st weekend. During this period, they mostly booked ice time (both rinks) from 6:00am to 11:00am in the morning, every day. MRA estimates the cost of this @$600/day/1 arena * 70 days = $42,000.[1] In addition, the operation conducted 15 (almost) full days of tournament play in May divided, equally between the 2 rinks, at an estimated cost of $15,000 per arena. Other ice time during the year, usually for just 1 arena, is estimated at $10,000. The estimated total ice time cost for one arena use was approximated as $67,000 per year.

As one of the oldest, and seemingly (by comparison with about one-dozen others) one of the most successful hockey training programs in North America, AHP provides significant competition (e.g., a proven track-record, established clientele, and two arenas under 1 roof) for any new hockey training/tournament program in Windsor. It also has a robust operation in PEI and seems not likely to move.

Tom Duffey Hockey Schools

Tom Duffey Hockey School is another notable hockey training program based in Halifax that serves Nova Scotia and has an established track record.

"Tom Duffey Hockey Schools now in its twenty-second year, sets a Canadian and International hockey school standard for comprehensive skill development. We offer schools throughout the year in

[1] Estimated summer ice time costs and potential bulk rate discounts. Regular ice time cost in the winter season was quoted as $689/one 5-hour morning session.

Halifax/Dartmouth, Bedford, Bridgewater, Membertou (Sydney) Nova Scotia and in Quispamsis, New Brunswick."

"In our twenty-two years, we have seen numerous schools come and go. For those who have yet to try our schools, check us out and see why we have become one of the leading independent hockey schools in Atlantic Canada."

It is possible that this operation might operate one or more of their programs in Windsor, under the right circumstances. However, their ice time demand at present would appear to be relatively small (programs tend to be sporatic, short-term [3 days] and mostly aimed at the Halifax-Dartmouth-Bedford market).

Also see www.andrewshockey.ca and http://www.tomduffeyhockey.com

Appendix 14 – Rink Revenue-Expense and 5-Year *Pro Forma*

	A	B	C	D	E	F	G
2		Approved May 23, 2017		TOWN OF WINDSOR - GENERAL			
3				Operating Budget 2017/18			
4							
5		DESCRIPTION		2016/17	2017/18	$ Variance	% Variance
6				BUDGET	BUDGET	BUDGET	BUDGET
7							
8							
9							
94	10-014-2730-000-5261	Aquafit		3,000	2,100	-900	-30.00%
95	10-014-2730-000-5265	Pool Pass Grants (Non Cash)		400	400	0	0.00%
96	10-014-2730-000-5275	Hants Aquatic Society - Lifeguard Grant		4,100	5,000	900	21.95%
97							
98		Section total		69,500	81,000	11,500	16.55%
99							
100		Revenue - Ice Rentals					
101	10-014-2740-000-5295	West Hants Minor Hockey Association		89,250	95,000	5,750	6.44%
102	10-014-2740-000-5300	King's-Edgehill School		26,250	22,000	-4,250	-16.19%
103	10-014-2740-000-5305	Avonview High School		15,750	17,000	1,250	7.94%
104	10-014-2740-000-5310	Cameron Maynard		3,150	3,000	-150	-4.76%
105	10-014-2740-000-5315	Sports Club		3,670	2,000	-1,670	-45.50%
106	10-014-2740-000-5320	Hants County Oldtimers		11,550	10,000	-1,550	-13.42%
107	10-014-2740-000-5325	25+ League		8,400	9,000	600	7.14%
108	10-014-2740-000-5336	Valley Maple Leafs		17,850	18,750	900	5.04%
109	10-014-2740-000-5340	Learn to Skate (formerly Canskate)		1,000	1,000	0	0.00%
110	10-014-2740-000-5345	Sundry Rentals		28,350	32,000	3,650	12.87%
111	10-014-2740-000-5350	Public Skating		2,000	1,500	-500	-25.00%
112	10-014-2740-000-5355	Noon Hour Skating		1,500	1,000	-500	-33.33%
113	10-014-2740-000-5360	Arena Canteen/Pop machine revenue		1,500	570	-930	-62.00%
114	10-014-2740-000-5365	P A System Rental		500	200	-300	-60.00%
115	10-014-2740-000-5370	Skate Sharp Concession Rent		500	500	0	0.00%
116	10-014-2740-000-5375	Ice Resurface Advertising		1,000	1,000	0	0.00%
117	10-014-2740-000-5380	Other Rink Revenue		12,000	8,000	-4,000	-33.33%
118							
119		Section total		224,220	222,520	-1,700	-0.76%
120							
121							

REVENUE

	A	B	C	D	E	F	G
2		Approved May 23, 2017		TOWN OF WINDSOR - GENERAL			
3				Operating Budget 2017/18			
4							
5		DESCRIPTION		2016/17	2017/18	$ Variance	% Variance
6				BUDGET	BUDGET	BUDGET	BUDGET
7							
8							
9							
905	10-027-2730-000-6020	Wages-Pool		60,000	72,000	12,000	20.00%
906	10-027-2730-000-6100	EI-Pool		2,100	2,500	400	19.05%
907	10-027-2730-000-6115	CPP-Pool		3,100	3,700	600	19.35%
908	10-027-2730-000-6140	WCB-Pool		1,500	1,900	400	26.67%
909	10-027-2730-000-6230	Telephone Services-Pool		400	400	0	0.00%
910	10-027-2730-000-6250	Office supplies- Pool			200	200	#DIV/0!
911	10-027-2730-000-6280	Insurance-Pool		2,100	1,600	-500	-23.81%
912	10-027-2730-000-7818	Training pool staff-Pool		1,500	2,100	600	40.00%
913	10-027-2730-000-7820	Program Supplies-Pool		3,000	3,500	500	16.67%
914	10-027-2730-000-7821	Chemical Supplies-Pool		7,000	8,000	1,000	14.29%
915	10-027-2730-000-7823	Bldg, Grounds & Eqp - Mntce & Repairs-Pool		7,000	7,000	0	0.00%
916	10-027-2730-000-7828	Light & Power-Pool		12,500	12,500	0	0.00%
917	10-027-2730-000-7829	Water/Sewer Charges-Pool		10,000	12,000	2,000	20.00%
918	10-027-2730-000-7849	Pool Pass Grants (Non Cash)		400	400	0	0.00%
919							
920		Section total		144,600	161,800	17,200	11.89%
921							
922		Arena					
923	10-027-2740-000-6010	Salary- Rink Management		42,000	42,000	0	0.00%
924	10-027-2740-000-6020	Wages- Rink		38,000	38,000	0	0.00%
925	10-027-2740-000-6100	EI-Rink		2,000	2,100	100	5.00%
926	10-027-2740-000-6115	CPP-Rink		3,200	3,200	0	0.00%
927	10-027-2740-000-6140	WCB-Rink		1,800	1,800	0	0.00%
928	10-027-2740-000-6230	Telephone Services-Rink		800	1,200	400	50.00%
929	10-027-2740-000-6250	Office Supplies-Rink		1,000	1,000	0	0.00%
930	10-027-2740-000-6280	Insurance-Rink		2,800	2,800	0	0.00%
931	10-027-2740-000-7862	Rink - Bldg Rental		4,000	6,000	2,000	50.00%
932	10-027-2740-000-7864	Light & Power-Rink		44,000	47,000	3,000	6.82%

EXPENSES

ARENA

	A	B	C	D	E	F	G
2		Approved May 23, 2017		TOWN OF WINDSOR - GENERAL			
3				Operating Budget 2017/18			
4							
5		DESCRIPTION		2016/17	2017/18	$ Variance	% Variance
6				BUDGET	BUDGET	BUDGET	BUDGET
7							
8							
9							
933	10-027-2740-000-7866	Water/Sewer Charges-Rink		15,000	15,000	0	0.00%
934	10-027-2740-000-7868	Water Heater Rent & Mntce-Rink		1,500	100	-1,400	-93.33%
935	10-027-2740-000-7870	Plant Repairs & Mntce-Rink		20,000	10,000	-10,000	-50.00%
936	10-027-2740-000-7872	Plant Supplies-Rink		800	800	0	0.00%
937	10-027-2740-000-7874	Bldg Repairs & Mntce-Rink		4,000	5,000	1,000	25.00%
938	10-027-2740-000-7876	Janitorial Supplies-Rink		1,600	1,600	0	0.00%
939	10-027-2740-000-7878	Ice Clean Equip Rep & Main-Rink		1,000	2,500	1,500	150.00%
940	10-027-2740-000-7880	Propane - Ice Cleaner-Rink		9,500	9,500	0	0.00%
941	10-027-2740-000-7882	Grounds Mntce & Snow Removal-Rink		6,000	6,000	0	0.00%
942	10-027-2740-000-7888	Sound System Costs-Rink		100	100	0	0.00%
943	10-027-2740-000-7890	Training, Travel -Rink		200	200	0	0.00%
944	10-027-2740-000-7892	Miscellaneous-Rink		5,000	5,000	0	0.00%
945	10-027-2740-000-7894	Shutdown Exp - Move Fill-Rink		8,000	8,000	0	0.00%
946	10-027-2740-000-7896	Canteen Expenses-Rink		1,500	1,500	0	0.00%
947							
948		Section total		213,800	210,400	-3,400	-1.59%
949							
950		Other Programs					
951		Programs					
952	10-027-2750-000-6020	Wages-Recreation programs		15,000	15,000	0	0.00%
953	10-027-2750-000-6022	Wages-Summer programs		26,000	33,500	7,500	28.85%
954	10-027-2750-000-6024	Wages-KES aquatic program		2,000	2,000	0	0.00%
955	10-027-2750-000-7906	Program Facility Costs-Recreation		5,000	5,000	0	0.00%
956	10-027-2750-000-7908	Program Supplies/expenses-Recreation		3,500	3,500	0	0.00%
957	10-027-2750-000-7910	Winter Carnival expenses		1,500	1,500	0	0.00%
958	10-027-2750-000-7911	KES aquatic program		10,000	10,000	0	0.00%
959	10-027-2750-000-7914	Summer program expenses		1,500	4,000	2,500	166.67%
960	10-027-2750-000-7916	Volunteer Banquet		2,500	1,500	-1,000	-40.00%

ARENA

FINAL "CORP"

LPAS Proforma Income Statement					
	Year 1	Year 2	Year 3	Year 4	Year 5
Revenues	50%	65%	75%	90%	100%
Ice Rentals	$ 250,000.00	$ 326,850.00	$ 375,650.00	$ 450,200.00	$ 500,000.00
Walking Track	$ 18,000.00	$ 19,800.00	$ 24,750.00	$ 24,750.00	$ 24,750.00
Heritage Museum (percent of Sales)	$ 12,000.00	$ 15,000.00	$ 16,500.00	$ 18,150.00	$ 19,965.00
Concessions	$ 12,000.00	$ 13,200.00	$ 14,520.00	$ 15,972.00	$ 17,569.20
Skate Sharpening	$ 6,000.00	$ 6,600.00	$ 7,260.00	$ 7,986.00	$ 8,784.60
Special Events	$ 15,000.00	$ 18,750.00	$ 23,437.50	$ 29,296.88	$ 36,621.09
Total Revenue	$ 313,000.00	$ 400,200.00	$ 462,117.50	$ 546,354.88	$ 607,689.89
Expenses					
Accounting	$ 3,750.00	$ 4,125.00	$ 4,537.50	$ 4,991.25	$ 5,490.38
Advertising/ marketing	$ 25,000.00	$ 27,500.00	$ 30,250.00	$ 33,275.00	$ 36,602.50
Electricity	$ 107,500.00	$ 139,750.00	$ 161,250.00	$ 193,500.00	$ 215,000.00
Furniture and Equip	$ 2,000.00	$ 2,000.00	$ 2,000.00	$ 2,000.00	$ 2,000.00
Garbage	$ 1,000.00	$ 1,100.00	$ 1,210.00	$ 1,331.00	$ 1,464.10
Property Insurance	$ 12,000.00	$ 12,600.00	$ 13,230.00	$ 13,891.50	$ 14,586.08
Directors Insurance	$ 2,500.00	$ 2,500.00	$ 2,500.00	$ 2,500.00	$ 2,500.00
Office	$ 2,200.00	$ 2,200.00	$ 2,200.00	$ 2,200.00	$ 2,200.00
Propane	$ 1,900.00	$ 2,090.00	$ 2,299.00	$ 2,528.90	$ 2,781.79
Telephone/ Internet	$ 1,600.00	$ 1,680.00	$ 1,764.00	$ 1,852.20	$ 1,944.81
Operating Total	**$ 159,450.00**	**$ 195,545.00**	**$ 221,240.50**	**$ 258,069.85**	**$ 284,569.65**
Staffing	$ 150,000.00	$ 165,000.00	$ 180,000.00	$ 200,000.00	$ 220,000.00
Total Expenses	**$ 309,450.00**	**$ 360,545.00**	**$ 401,240.50**	**$ 458,069.85**	**$ 504,569.65**
Operating income	**$ 3,550.00**	**$ 39,655.00**	**$ 60,877.00**	**$ 88,285.03**	**$ 103,120.24**

Aug 30, 2017

Appendix 15 – Feasibility Study Objectives

Project Objectives (Statement of Work)

The Department of Communities, Culture, and Heritage issued a Statement of Work (SOW) for services to conduct a feasibility study to assist site selection for potential investment in a hockey heritage museum and arena to recognize the Windsor area as home to the birthplace of hockey.

The government's consideration of investment in this project include looking at benefits to the local community and the province related to the use of, and employment at the facility and its ability to draw tourism and host events.

The contracted consultant will clearly present an analysis of cost and other tangible and intangible factors in-order-to assist the decision-making process between the two sites. The consultant will provide a complete and clear evaluation of the project's tourism potential and ongoing sustainability; distinguish each site option in its ability to support the goals of the project; and identify any issues and associated costs with developing either site.

Project Tasks and Deliverables

Relating to both proposed sites, providing individual SWOTs (strengths, weaknesses, opportunities, and threats), the Proponent will complete and document for presentation to the Department the following work, and requested amendments thereto, to the Department:

a) Tourism & Events

- How heritage and sport features would contribute to Nova Scotia's tourism market, including analysis of the tourism potential overall
- Analysis of the potential to attract hockey interests for professional / amateur endeavours marketing the birthplace of hockey
- Potential for revenue generating opportunities and branding

b) Sustainability

Linked with the tourism analysis, a profile, within a SWOT analysis format, of the community support for both options, proposed governance, as well as other tangible and intangible factors which may contribute to the long-term success of either site, including:

1) Tangible and Intangible Benefits
   - proposed employment and other potential economic benefits
   - possible economic development opportunities including for ongoing revenue generation - how do the sites support; is there viability in the longer term?
   - the relationship to municipal governments and ongoing funding commitments (the Province will not provide ongoing operational support)

2) Facility Operations & Governance

- capacity and experience of potential operators
- proposed business model
- objectives and purpose of each proposal
- viability of operating models
- demonstrated history/ability to raise necessary balance of capital within a reasonable timeframe

c) Site Evaluation Parameters

The report will include information about the importance of location in meeting project goals and supporting ongoing economic viability of the facility including the extent to which each site supports these objectives. It will also give enough information for confirmation of whether proposed costs assumptions still hold or need to be updated for either proposal.

The Consultant will provide screening level analysis for site evaluation parameters (i.e., would include review of existing information and visual assessment of site parameters but not physical investigations such as drilling) including:

1) Location and Access *for both sites*

   - Compatibility of each site with adjacent land uses. Potential to generate economic activity for adjacent businesses.
   - Extent to which condition and nature of road access is a factor in potential of each site. Improvements or changes required for each site (including consideration of physical and functional road characteristics as well as any ownership and governance aspects).
   - An assessment of whether traffic volumes generated by the facility are likely to impact existing public roadways to an extent requiring infrastructure upgrades. If so, what upgrades would be required.
   - Importance of pedestrian access in the success of the facility and, if so, what measures would be required to support this access.

2) Acquisition & Development *for both sites*

   - Land acquisition considerations including timing and cost.
   - Land area required for facility and site requirements (including parking and on-site circulation) and area available.
   - Availability/proximity/capacity of municipal services (water, storm, sanitary). Suitability of site for meeting water supply and sewage disposal needs in the absence of municipal services.
   - Availability of 3-phase power/phone/high-speed internet service.
   - Present or future natural gas availability.
   - Presence and extent of potential encumbrances (e.g. easements, flood plain, wetlands, brown-field remediation, rock, etc.).
   - Natural features that would facilitate construction (e.g. flat areas, minimal reshaping of topography required).
   - Site suitability with respect to energy saving initiatives (e.g. solar panels, geo-thermal heat, etc.).

Consultant Evaluation Framework

Additional Underlying Factors of the Analysis

In addition to the Statement of Work outlined above, the consultant notes the following aspects of the Market Study work that may require special attention:

1. The proposed Hockey Heritage Centre combines both a museum and an arena (the Windsor/West Hants proposal describes the arena as an "exhibit" in the museum). However, as the sustainability of the combined operations involves significantly different revenue and expense sources, it is necessary to study these operations separately, as well as jointly.

2. Increased spending in a community such as Windsor will undoubtedly create economic benefits for the immediate area. However, if this spending is mainly done by fellow Nova Scotians, or by non-native visitors who would otherwise come to Nova Scotia for some other reason and spend their money somewhere else in the province, this is not a net economic benefit to the Province.[1] The same can be said for the federal government that ideally would seek out-of-country spending in Canada. As both these levels of government are being asked to support the proposed new facility, the consultant has focused on economic benefits to the country and province, as well as the local community.

3. The consultants have used the distinctions of "available markets" (to describe potential demand, or markets that might be activated to purchase) and market demand (actual demand where a purchase has, or is expected, to occur) throughout the report.

[1] There are some exceptions, such as extended stays, that might be noted.