



Leger
THE RESEARCH INTELLIGENCE GROUP

**City of Edmonton
Qualitative Research Report
Stadium Research**

July 2013

Canada

Toronto
Edmonton
Calgary
Montreal
Quebec City

USA

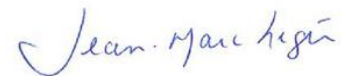
Philadelphia, PA
Denver, CO
Tampa, FL

Europe

Zurich

The largest
Canadian-owned
marketing research
and polling firm

We are proud to present you with this research report, which was produced under the stringent quality standards of our company and those of the Marketing Research and Intelligence Association (MRIA). We are confident that this report will address your concerns and we hope to have the privilege of serving you again in the near future.



Jean-Marc Léger
President



CONTEXT
AND OBJECTIVES



CONTEXT AND OBJECTIVES

4

Understanding how user groups book and use the City-owned outdoor rectangular fields in Edmonton

This qualitative research is the first of a two-phase research project to assess the need for a new medium-sized stadium in Edmonton.

The primary objective of the qualitative research was to understand how key stakeholders book and use existing outdoor fields, in order to develop a questionnaire for a City-wide online survey of user groups within the sporting community.

More specifically, the in-depth interviews were designed to ...

- Understand how the booking process takes place, including what works well and what doesn't.
- Gauge current and past usage of grass and artificial turf facilities, and if the needs for these types of facilities are being met.
- Obtain reactions to the potential new stadium, including the need for this type of facility and the amenities that should be included.



RESEARCH METHODS



RESEARCH METHODS

6

In-Depth Interviews

Eight (8) interviews were conducted by telephone with the following organizations between June 4th and June 14th 2013...

A total of 8 in-depth interviews with sports organizations in Edmonton

- Alberta Soccer Association
- Capital District Minor Football Association
- Edmonton District Soccer Association
- Edmonton Interdistrict Youth Soccer Association
- Football Alberta
- Grant MacEwan University
- Greater Edmonton Lacrosse Council
- Victoria Soccer Club

In order to assess the potential to earn revenue through outdoor concert events, an additional four (4) interviews were conducted with the following promoters and venues:

- The Union
- Live Nation
- Burton Cummings Theatre
- MTS Centre





STRATEGIC CONCLUSIONS

“If the city can afford it, great!”

“A new stadium would help alleviate a friction point between soccer and football”

“Booking artificial turf in Edmonton is a nightmare ... there’s not enough space”

Overall sentiment toward a new stadium is positive, although it is not considered a necessity

- On a philosophical level, user groups recognize that a new stadium would reflect well on Edmonton, and would benefit the soccer community (and FC Edmonton) in particular
- However, users admit they would not take full advantage of the seating capacity of 8,000 to 10,000 spectators

Having one more artificial turf facility is seen to be the key benefit of a new stadium

- There is strong desire for artificial turf, because these facilities are less susceptible to weather-related cancellations and thus allow games, leagues and organizations to stay on schedule.
- Among those who can afford to book artificial turf, some cannot book the amount of time they need, because of the high demand
- There is also some frustration with the booking process, which (unlike grass fields) is not based on historical usage, and permits over-booking.

A City-owned stadium is expected to advance the whole amateur sport community, not one specific sport, and not one private club

- Rental prices should be affordable, similar to existing facilities (e.g. Clarke, Jasper Place, etc.)
- Needs to be accessible to all groups, and sports (“not like Commonwealth”)
- Should follow a city-owned and operated model, similar to other facilities (to ensure accessibility and affordability)

There is an opportunity for the stadium to earn additional revenue through concerts & events

- A medium-sized outdoor venue would fill a unique niche in Edmonton, particularly if the seating on-field can expand total capacity to 20,000 people.
- In order to maximize this potential, there are several operational factors and design elements to consider.

2005	25%
2006	35%
2007	36%
2008	48%
2009	55%
2010	80%
2011	85%



+40%

+10%

40%





DETAILED ANALYSIS OF RESULTS

10

“It doesn’t take long to figure out that you need to bring two or three people with you to book artificial turf at the allocation meetings.”

“The need for space (artificial turf) is so dire.”

Booking Process

- The process for booking grass fields is based on historical usage, and works very well from the users’ perspective.
- Booking artificial turf is more challenging for users, and they describe it as “a scramble,” “hectic,” “chaotic,” and “a nightmare.”
- Organizations will overbook turf facilities to ensure they have enough time slots and the time slots they want. Later, they turn back times to adjust for their operating budget. This process creates uncertainty around securing times and fields, and becomes “a long, stressful process.”
- There is a desire to design the booking process so that it honours the “natural, historical season” for each sport. For example, soccer is played in the spring, football is played in the fall.
- Consideration to timetabling should also be given, particularly with respect to school teams. For instance, the academic day runs from 8:00am to 4:00pm, thus practices are scheduled in the evenings. Competitions take place on the weekends, to allow time for travel.



DETAILED ANALYSIS OF RESULTS

11

“We would use artificial turf all the time if we could get it”

“Turf fields are maxed out ... packed with soccer and football”

Current / Past Usage

- Usage of grass vs. turf is based largely on the organization’s budget. Some state they would like to use turf more often, but cannot afford it.
- Many users prefer turf because scheduling is more convenient - it is less susceptible to cancellations, and can withstand more wear-and tear, allowing for more back-to-back games than a grass field could manage.
- Football in particular has a high demand for artificial turf facilities, stating they can only play in staffed facilities.
- Academic teams at the post-secondary level have an “inflexible” need for turf facilities because they cannot afford to have weather-related cancellations. Many of the teams at this level incur inter-provincial travel costs to attend games.
- There is a desire to have some turf fields dedicated to specific sports. For example, Clarke is considered “ideal” for football while Jasper Place is perfect for Lacrosse.



DETAILED ANALYSIS OF RESULTS

12

“ We’d use it (a new stadium) ... if it’s priced the same as the other turf fields”

Reaction to a New Medium-Sized Stadium

- A new stadium is not a “need” for the sporting community – mainly because there is little need for seating capacity for 8,000 to 10,000 spectators. Attendance at games is low, and limited to friends and family. Although attendance would spike during national championships, hosting these events is rare (every two to five years) and attendance is estimated to top out at 2,000 people (for soccer / lacrosse) and 5,000 people for football.
- There is also little need for special amenities (other than dressing rooms and WC), although it would be “nice” to have lights and at least four change rooms (to allow overlap between teams).
- There was considerable comment about the field markings (lines) – and some suggest that erasable lines are best, to allow for multiple sport user groups with minimal visual clutter.
- There is a strong expectation for the stadium to be City-owned and operated, so all Edmontonians can access and use it.
- This operating model would also imply that the facility is affordable – and priced similarly to the existing premium fields in the city.
- Some suggest that there could be a different fee structure based on using the “field surface only” vs. the entire facility (amenities, seating, staff, etc.). Along the same lines, others suggest that fees should be reduced for practice times.



DETAILED ANALYSIS OF RESULTS

13

*“If you build it,
they will come ...
can work, if it’s
done right”*

*“If costs are
comparative to
arena, in the
summer,
outdoor wins”*

*“You can’t sit
there waiting
for the phone to
ring”*

Potential for Concert / Event Promotion

- There are several design considerations for the City to consider if they want to pursue opportunities to host non-sporting (e.g. concert) events:
 - Configuration – optimum is U-shaped, to minimize the loss of seating to the set-up of a stage at one end of the field
 - Location – for access (i.e., transit vs. drive/parking) and for noise restrictions (i.e. proximity to residential areas)
 - Access to field – for patrons (safety exits for those with field seating) and also two access points for semi-trailers (one for event staging / equipment) and another for standard supplies (e.g., beer, food, etc.)
 - Field surface – the “working” end ideally would be paved to handle the load / weight of the stage, semis, equipment, etc. This makes the venue more attractive in terms of set-up (4 hours versus 3 days)
 - Seating – ideally would be in the 20,000 to 25,000 range to differentiate from the two arenas already serving the 10,000 to 15,000 market (i.e., the new downtown arena, plus Rexall Place, which is expected to stay open for concerts)
- Suggestions for operating a new outdoor stadium ...
 - Engage in your own programming and book your own shows. Booking the facility for concerts has to be managed / pursued proactively by the operator.



DETAILED ANALYSIS OF RESULTS

14

“Commonwealth is used (at most) 20 days and sits empty for the remainder of the calendar year. Why?”

Additional Feedback

- Respondents appreciated the opportunity to provide input into the research process, and expressed the desire for involvement, should the City decide to build a new stadium.
- Many participants expressed concerns about the under-utilization and/or unavailability of Commonwealth Stadium. There is a strong desire to avoid building another facility like that – which is perceived as a “huge waste.”



APPENDIX



APPENDIX

Interview Guide

The interview guide was designed in consultation with the City of Edmonton, to understand usage, reactions to a potential new stadium and to develop and refine questions for a city-wide online survey

OPENING

- Moderator introduction (name, project role)
- Study purpose, sponsor, scope
- Survey online
- Respondent introduction

INTRODUCTION

1. When I say “medium-sized soccer stadium in Edmonton” what comes to mind?

TRANSITION INTO TOPIC

2. Can you help me understand how the process works, when you need to book a venue for your game / practice / team / etc.?
- a. What’s easy about the process?
 - b. What do you find challenging or difficult?
 - c. How about using the facility? What works and what doesn’t?

KEY RESEARCH QUESTIONS

3. Current / past usage

- a. What types of fields and facilities has your organization or team used in the past three years?
- b. What proportion or percentage of your entire season is used in each type of field?

4. Facility Usage – Grass and Artificial Turf

- a. How many months is a typical “season” for your sport? ____ months
- b. Approximately how many hours per season are you booking ... grass, turf?
- c. Which artificial turf facilities are you booking? Why do you use those facilities specifically?
- d. Challenges - Have you ever had any challenges booking field time – either grass or artificial? Were you ever unable to book the facility you wanted? Were you ever unable to book the time slot you wanted?



APPENDIX

Interview Guide

KEY RESEARCH QUESTIONS

5. New stadium

a. As you may know ... the City is considering the viability of a new facility, which would include seating for 8,000-10,000 spectators. From your organization's perspective, is there a need for this type of facility? Why? Why not?

b. Assuming the hourly rate would be comparable to what you're paying now for Clarke, Jasper Place and Mill Woods ... would your organization use a facility like this? Why? Why not?

c. Currently the City of Edmonton owns and operates the existing staffed premium sport fields in the city. These are Clarke, Jasper Place, etc. If a new stadium were built, would you want to have a similar "City-owned and operated" model being used?

d. Do you prefer grass or artificial turf for this new facility?

e. What supporting amenities would your organization like to have in this new stadium?

f. Knowing that there would be more seating, and supporting amenities like dressing rooms, concessions, multi-purpose rooms, and lighting ... what is the maximum hourly rate you would pay to use this new facility?

i. What feedback on pricing would you like me to pass along to the City?



APPENDIX

Interview Guide

KEY RESEARCH QUESTIONS

6. Perceived trends

- a. In the next five years, do you think your organization would will be using artificial turf facilities more, less or the same as you do now ...
- b. And what about grass field? In the next five years, do you think your organization would will be using grass field more, less or the same as you do now ...
- c. What trends can you think of that would be relevant to building a new stadium in Edmonton?

CLOSING

7. From your perspective, what's the most important consideration that the City should take into account if they were to build a medium-sized stadium here?
PROBE FULLY Why is that most important?

