\_\_

Bluewater Sports Management

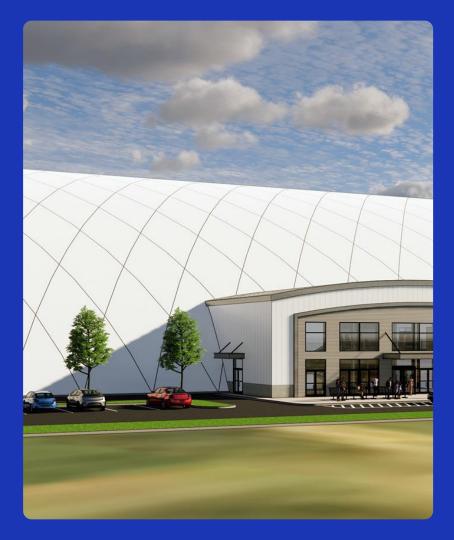
# Indoor Turf Facility

**Huron Kinloss, Ontario** 

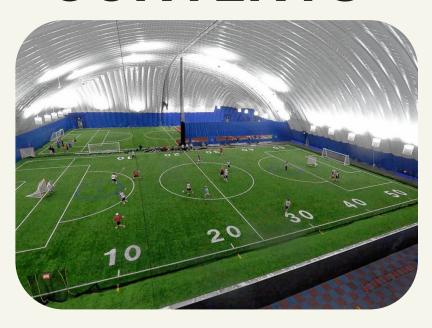




## FEASIBILITY STUDY FOR AN INDOOR ARTIFICIAL TURF FACILITY



# TABLE OF CONTENTS



Executive Summary	4
Introduction	5
Project Background	6
Planning Context and Market Demand	8
A Regional Demographic Profile	9
Existing Regional Supply of Artificial Turf Fields	
Service Level Analysis	
Stakeholder Engagement	
Stakeholder Insights	16
Key Themes and Findings from the Questionnaire	17
Trends and Leading Practices	19
Site Program and Amenities	22
Site Program	
Dome Placement	
Preliminary Capital and Operating Cost Estimates	. 26
Projected Utilization	. 28
Dome Operating Budget Scenarios	. 30
Revenue Scenarios	
Estimated Capital Development Costs	
Revitalizing Park Spaces for a Thriving Community	



# **EXECUTIVE SUMMARY**

This study was undertaken to inform understanding about the financial sustainability of a future artificial field development project in Huron Kinloss or the surrounding area. Based on input gathered through consultation with potential project partners, feedback from potential sport field users, and demographic and best practices analysis, this report offers a business case developed from the following study conclusions:

- There is evidence of overwhelming demand for indoor artificial turf facility housing soccer, baseball and pickleball to serve a catchment population within 45 minutes from Huron Kinloss.
- KinBruce park (Huron Kinloss) is an ideal location for an indoor artificial turf facility
- Indoor facility operating budget scenarios are net positive at 60% operating capacity during peak hours (6-10 pm weekdays & 8am - 8pm weekends) plus summer camps and PD days.
- The rounded, estimated capital cost of indicated capital items required for the facility which will include two (2) 7v7 soccer fields (one lined for baseball), batting cages, pickleball courts, reception, change rooms and meeting room, is \$6,000,000

Confidentia

# INTRODUCTION

INCLUDED IN THIS SECTION:

PROJECT BACKGROUND



### PROJECT BACKGROUND

Bluewater Sports Management commenced this study to further understand the opportunities and business fundamentals of developing and operating an indoor artificial turf field facility in Huron Kinloss or the surrounding area. The is intended to inform future decision making and next steps amongst stakeholders and Town Council.

The study process involved stakeholder engagement, analysis of local and regional market conditions and an assessment the KinBruce Park (Huron Kinloss) location. A preferred site is selected, and a preliminary site concept plan are provided for and indoor turf sports dome that would house baseball, soccer and pickleball year round. Order of magnitude capital and operating cost scenarios were developed based on different utilization rates.

The service level decision to invest in an indoor artificial turf dome in Huron Kinloss ultimately provides benefits to many local field sport organizations, including:

- Play Extension: users can begin their season on an indoor artificial turf field earlier in the Spring and play longer into the Fall compared to the playing season on natural turf.
- Winter Programs: Users can practice, train or participate in recreational sport activities or programs under a heated, seasonal dome during the winter.
- Maintain Competitiveness: Huron Kinloss and surrounding area organizations that utilize the sports dome for longer training periods will have a competitive
  advantage over teams in other municipalities that do not have access to indoor facilities.

### PROJECT BACKGROUND

STAGE 1:
RESEARCH
AND
ANALYSIS

STAKEHOLDER DISCUSSION AND SURVEY

DEMOGRAPHIC ANALYSIS

TRENDS AND PRACTICES
RESEARCH

STAGE 2:
PREFERRED
SITE

SITE EVALUATION

PRELIMINARY "FIT"
ANALYSIS

SITE DEVELOPMENT AND PROGRAMS OPTIONS

STAGE 3:
OPERATING
AND
CAPITAL
COST
SCENARIOS

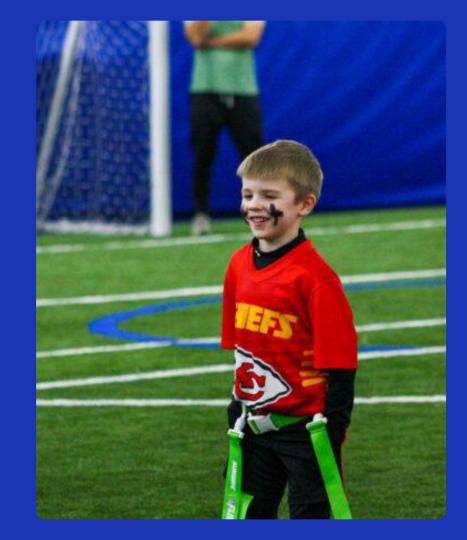
UTILIZATION SCENARIOS FOR SPORTS DOME

Confidential

## PLANNING CONTEXT AND MARKET DEMAND

#### INCLUDED IN THIS SECTION:

- KEY LOCAL AND REGIONAL POPULATION AND DEMOGRAPHIC ATTRIBUTES
- EXISTING SUPPLY OF TURF FIELDS
- SERVICE LEVEL ANALYSIS



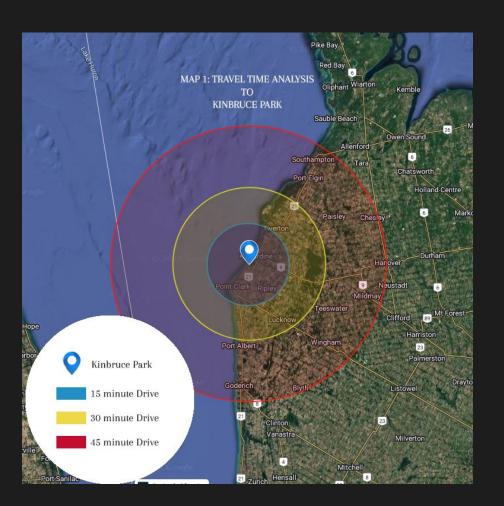


### A REGIONAL DEMOGRAPHIC PROFILE

Demographic characteristics offer useful insights for understanding potential demand. Table 1 on the following page characterizes the demographic profile of the catchment areas within 15, 30 and 45 minutes of Huron Kinloss shown in Map 1 following.

Forty-Five (45) minutes is typically regarded as the maximum duration a participant would routinely travel to participate in a recreation or sport program. Recreation facilities have accommodated non-resident players from within the 45-minute catchment area while no existing publicly accessible artificial turf fields or sports domes are within it. Potential facility user groups that responded to the stakeholder survey conducted for this study indicated a maximum travel duration tolerance of 45 minutes.

Confidential



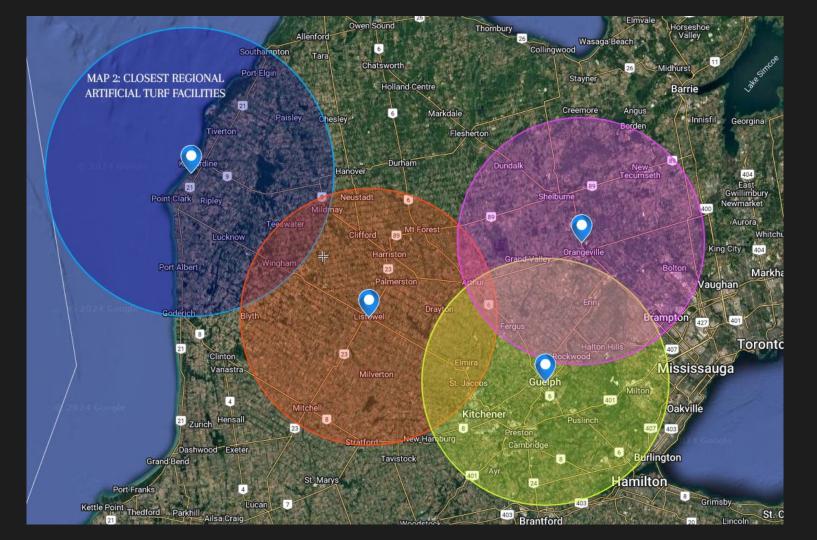




## EXISTING REGIONAL SUPPLY OF ARTIFICIAL TURF FIELDS

Table 2 provides a sample of artificial turf facilities within 2 hours of Huron Kinloss. The routinely publicly available indoor artificial turf fields nearest Huron Kinloss are in Listowel (field house) and Mono Township (indoor/outdoor). Listowel is approximately 1 hour and 5 minutes from Huron Kinloss and Mono Townships is approximately 2 hours from Huron Kinloss. The nearest outdoor-only artificial fields are at the University of Guelph and in Stratford. Map 2 illustrates that there is minimal-to-no overlap between each of the nearest artificial turf fields from Huron Kinloss.

Confidentia



		Existing Artificial Turf Fig	elds	
Artificial Turf Field Site	Number of Artificial Turf Fields on the Site	Location	Notable Characteristics and Attributes	Distance from Kincardine
Outdoor Only				
Pretty River Academy (Private School)	2/3 Size Field	Collingwood	This field is not generally available for public rental.Not lit.	1 Hour 45 minutes
University of Guelph Varsity Field	1 Full Size Field	Guelph	Outdoor field, lit, spectator seating; available for public rental	2 Hours
Stratford Festival Hydro Community Park	1 Full Size Field	Stratford	Public field, lit	1 Hour 35 Minutes
Stratford Academy – Hutchison Soccer Complex (Private School)	1 Full Size Field	Stratford	This field is not generally available for public rental. Lighting is planned.	2 Hours
Mapleview Secondary School	1 Full Size Field	Barrie	New artificial field developed at a new public high school in Barrie	2 Hours 30 Minutes
West Orillia Sports Complex	1 Full Size Field	Orillia	Lit and publicly available	2 Hours 40 Minutes
Indoor and Outdoor				
Athlete Institute	1 Indoor Field	Mono	An insulated sports dome is 24,000 square feet of year-round playing. Available for public rental.	2 Hours
City of Guelph Sports Dome	1 Indoor Field	Guelph	Seasonal Dome available for public and user group rental by the hour or on a seasonal contract	2 Hours
University of Guelph Gryphon Field House	1 Full Size / 3 Minis	Guelph	Permanent indoor field sport facility	2 Hours
Permanent Field House				
Listowel -Between the Lines	9,250 sq.ft. Turf Field	Listowel	This facility is privately owned and operated.	1 Hour
New Tecumseth Recreation Centre	1 Indoor Field	Alliston	The 130,000 square foot year-round facility, includes indoor turf among other amenities for the public	2 Hours
Pinnacle Fieldhouse Training Complex	Indoor Field House	Stratford	Multi-sport field options and configurations provided	1 Hour 30 Minutes

### SERVICE LEVEL ANALYSIS

A population-based service level is often established to rationalize the provision of a particular asset against anticipated population-based demand for the asset and the existing supply in the planning area. It is often expressed as a ratio of 1 per 1,000 population.

Many GTHA communities with populations over 100,000 offer an artificial turf field or a mix of fields provided by the municipality, secondary and post-secondary institutions, and privately held firms. While most of the existing outdoor artificial turf fields are provided by municipalities around the GTHA, outdoor/indoor fields and permanent field houses are often developed and operated through various types of public and private partnerships.

There is no widely accepted service level for an outdoor artificial turf field. Service levels for municipally provided fields range from 1:80,000 (Mississauga) to 1:120,000 (Ottawa). Many municipalities with populations well under 100,000 have more recently planned for or provided outdoor artificial turf fields in response to local demand (as noted in the table above). An appropriate service level for planning purposes in Huron Kinloss and surrounding area regional context is 1:65,000 population, based on the following considerations:

- The total population (2020) within 45 minutes of Huron Kinloss is about 55,000 persons.
- The nearest artificial turf facilities service a similar total catchment population (Listowel serves total population of 56,000 within 45 minutes and Mono serves a total population of 80,000 within 20 minutes).
- Potential regional facility users are likely to use existing services and facilities provided in Huron Kinloss

The suggested service level of 1:65,000 draws from a regional population to sustain a minimum level of utilization during the critical demand seasons during the winter, spring and fall. Huron Kinloss population, on its own, is not sufficient to generate a reasonable level of utilization for an artificial turf dome. While a service level of 1:65,000 represents a minimum population necessary for an artificial turf facility, the case for providing an indoor turf facility (and the appropriate size of it) is strongly influenced by local /regional demand (a strong field sport user community), one-time opportunities (development of a new school or recreation facility that may be offset by one-time funding or grants), or a unique form of partnership (joint use by a school and community/region). A financially sustainable business case is the most critical planning consideration for a facility of this nature.

## STAKEHOLDER ENGAGEMENT

### INCLUDED IN THIS SECTION:

 KEY FINDINGS FROM STAKEHOLDER QUESTIONNAIRE



### STAKEHOLDER INSIGHTS

Existing field user groups in Huron Kinloss and the surrounding area were invited to respond to a stakeholder survey that was distributed to collect insights from potential users of an artificial turf sports dome. Interviews were convened with Kincardine Minor Soccer, Kincardine Minor Baseball, Kincardine Adult Soccer, Kincardine Football Association, Kincardine Pickleball, Point Clark Pickleball, Saugeen Shores Pickleball, Saugeen Shores Minor Baseball, Ripley Minor Baseball and Ripley Minor Soccer to explore respective interests in the facilities being considered.

Findings from the questionnaire are provided below, and a detailed analysis of the results is provided in Appendix B.

#### QUICK READ: HIGHLIGHTS OF THIS SECTION

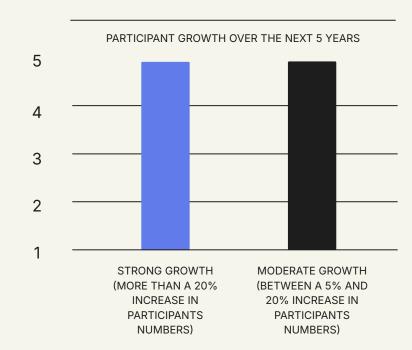
- There is strong interest from local and regional field sport organization for an indoor sports facility.
- Local and regional field sport organizations would travel 20-45 minutes to access facilities being considered.
- Hourly rental fees of between \$100 and \$130 per hour were viewed as reasonable.
- Local and regional field sport organizations will continue to use available natural turf fields when the play conditions are appropriate.



# KEY THEMES AND FINDINGS FROM THE QUESTIONNAIRE

10 organizations responded to the questionnaire. Not all groups responded to all questions.

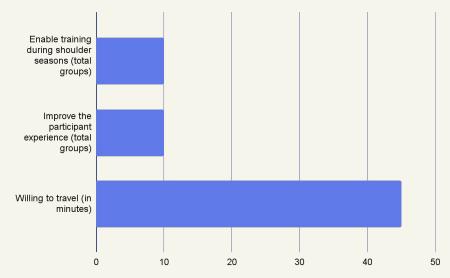
- 60% of participation reported by groups was for children and youth under the age of 18.
- All groups (100%) expect some level of growth in participation and/or membership in the next 5 years.
- 100% of groups utilize indoor space in the shoulder and/ or winter season. All groups indicating that they use gymnasiums in schools, community centres or churches. All groups need more time and space but the current facilities available are fully booked providing no room for growth.
- Kincardine Minor baseball currently has zero access to indoor facilities from the fall to spring



Confidential

# VALUE OF AND FIELD REQUIREMENTS OF AN ARTIFICIAL TURF

- Groups believe that an indoor artificial turf dome would enable training during shoulder seasons and improve participant experience. Most groups agree that it would reduce rainouts and cancellations due to inclement weather.
- Most groups would be willing to pay between \$100 and \$130 per hour for practice usage during primetime periods and for game and tournament usage of an artificial turf field. Some groups would be willing to pay more for game and tournament usage.
- Most groups are willing to travel between 20 45 minutes



# TRENDS AND LEADING PRACTICES

### INCLUDED IN THIS SECTION:

 NOTABLE ARTIFICIAL TURF TRENDS AND LEADING PRACTICES CONSIDERATIONS





Summarized in this section are notable trends and leading practices that are impacting artificial turf development and operations across Canada.

- Diversity of artificial turf product options. Whereas 10-15 years ago only a
  handful of vendors and products existed, procurers of artificial turf have
  numerous turf typology, infill, and underlay products that each have their
  associated attributes.
- Provide only the indoor space that will be fully utilized. Adding air support structures over artificial turf fields in response to demand for year-round facilities.
- Maximizing community benefits and access to artificial turf fields. Traditionally, artificial turf fields have been viewed as sites of elite level sport in a community with restricted (or no) access for spontaneous or recreational uses. This mindset is slowly evolving, and many communities are increasingly looking to ensure that artificial turf fields provide a broader public benefit. While the higher operational cost and maintenance realities of providing artificial turf fields can be a barrier to facilitating broader types of use, dedicated "drop-in" times (like a gymnasium), 1/3 and 1/2 field rental opportunities, and daytime (non-prime) use of artificial fields for fitness and youth programming are ways that many communities are expanding the benefits of an artificial turf field.
- Lifecycle Reserve Budgeting. Artificial turf fields typically have a lifespan ranging from 10-12 years influenced by several factors including levels of use, climate (e.g., indoor vs outdoor), site factors, and maintenance practices. Life cycle budgeting is a critical aspect of sustainability and can help ensure funding is in place to replace artificial turf surfacing prior to significant safety issues or deterioration of the playing surface.

- Capacity of Natural vs Artificial Turf Surfaces. A common rationale for retrofitting a natural turf surface to artificial turf is the ability to provide increased capacity. While there is a sufficient provision level of natural grass fields in Huron Kinloss and the broader regional market area, providing artificial turf would unquestionably provide increased capacity during "shoulder" seasons (early spring and late fall) and winter, reducing schedule disruptions due to inclement weather, required rest and maintenance.
- Economic Benefits. The degree to which providing an artificial turf venue
  can drive economic value is challenging to accurately quantify given the
  variability of activities and users. However, there is some logical rationale to
  believe that developing an artificial turf field could positively position Huron
  Kinloss to attract incremental non-local visitors to the community.
- Tournaments and games during shoulder seasons. The degree to which artificial turf is advantageous in attracting incremental major soccer events and major competitions is less clear than with football for a couple reasons. Most significant regional, provincial, and national events tend to prefer (and in some instances dictate) having access to multi-field sites. Whiles attitudes towards artificial turf and clear FIFA artificial turf guidelines have positively shifted attitudes towards artificial turf as a playing surface, a preference for high quality natural surface fields also still exists among some in the soccer community. However, it is likely that providing artificial turf will result in some incremental game and tournament hosting opportunities during shoulder seasons in the spring, fall and winter when weather is most likely to be a factor.
- Concerts, festivals, and other community events. Artificial turf fields can
  provide a well-suited event hosting venue for concerts, festivals, and other
  gatherings given the durability and consistency of the turf surface.

**Safety Considerations.** Numerous studies have been undertaken over the past decade to try and better understand the injury and player safety impacts of artificial turf vs natural surface fields. Summarized below is a sampling of key finding from several notable studies that reflect the differing and often contradictory evidence that exists with regards to the potential safety impacts of different field surface types.

- A study that tracked injury incidences in Major League Soccer from 2013-2016 found no discernible difference between natural and artificial turf surfaces.
- A compressive study of NCAA athlete injuries from 2004 looked at 3,009,205 NCAA athlete exposures and 2,460 knee injury occurrences to identify turf related attributes. The study found no difference in the mechanisms of knee injuries on natural grass and artificial turf.
- » In 2015 the City of Toronto in partnership with Toronto Public Health conducted a Health Impact Assessment of the Use of Artificial Turf. Notable conclusions from the study included:
  - Available evidence indicates that under ordinary circumstances, adverse health effects among adults and children are unlikely to occur because of exposure to artificial turf infill with crumb rubber in both outdoor and indoor settings
  - Adverse health effects among adults and children are unlikely to occur because of exposure to artificial turf infill with crumb rubber in both outdoor and indoor settings
  - Research used by the study suggests that artificial turf increases the risk of ankle injuries, with mixed evidence regarding knee injuries and muscle strains.
  - The study noted that there is insufficient evidence to clearly state that there is any difference between natural and artificial turf surfaces with regards to the prevalence of contact injuries such as concussions and fractures.
- In contrast to the above noted study in Toronto, a recent (2020) study published in the British Association of Sport & Exercise Medicine Journal did find an overall lower concussion and head injury rate occurring on artificial turf field surfaces for competitive contact sports. However, the study did note that further research was needed to investigate causality and the specific factors related to surface type that led to head injuries.

## SITE PROGRAM AND AMENITIES

### INCLUDED IN THIS SECTION:

- SITE PROGRAM (MAIN COMPONENTS AND AMENITIES)
- DOME PLACEMENT



### SITE PROGRAM

The preferred site program must best respond to an ideal mix of amenities required for sustainable operations of an artificial turf field sports dome that responds to market conditions. Key attributes of the site program will accommodate:

- Approximately 77,,000 sqft sports dome with a 4000 sqft brick reception building that will house mens and ladies change rooms and a meeting room
- Two 7 v 7 soccer fields
- both of the soccer fields will be lined with an overlapped 129 feet x 135 feet baseball infield that will accommodate hardball and softball training as well as wiffle ball games.
- 6 batting cages
- 6 pickleball courts
- An upgrade of of existing playground



Confidential

### DOME PLACEMENT

The following site concepts illustrate the site program for an indoor sports dome configuration (location of components and amenities) and spatial relationships to existing spaces and site conditions

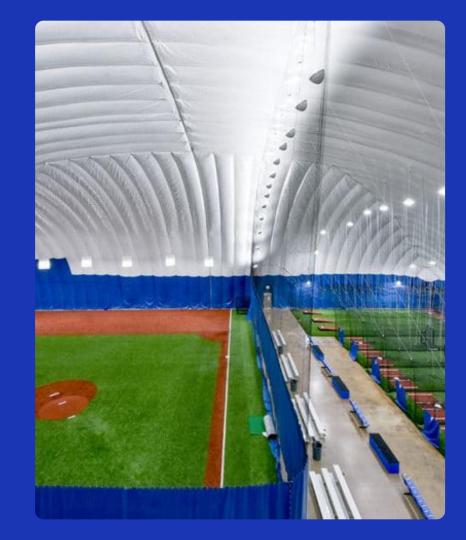


Confidential

# Preliminary Capital and Operating Cost Estimates

### INCLUDED IN THIS SECTION:

- PROJECTED CAPACITY UTILIZATION
- DOME OPERATING BUDGET SCENARIOS
- CAPITAL BUDGET ESTIMATE



Preliminary capital costs and operating budget scenarios for the indoor sports dome provide a financial perspective on the sustainability of the project. Projected utilization is based on responses to the Stakeholder Questionnaire and group meetings. Gross operating revenue aligns with noted assumptions and may vary over time because of changing market conditions.



#### QUICK READ: HIGHLIGHTS OF THIS SECTION

- There is demonstrated demand from Kincardine Minor Soccer, Kincardine Minor Baseball, Kincardine Football, Kincardine Pickleball, Point Clark Pickleball, Saugeen Shores Baseball, Saugeen Shore Pickleball, Ripley Minor Baseball and Ripley Minor Soccer greater than 90% weekly overall primetime utilization of the sports dome from October to May
- Summer field times will be supplemented by "non-primetime" hours with day camps, training, ect.
- All indoor field operating budget scenarios
- (65%, 75%, 85% capacity use) are net positive.
- The estimated capital cost for the sports dome is \$6,000,000

### PROJECTED UTILIZATION

Multiple youth sports organization indicated the number of weekly hours they would use on indoor turf fields in the stakeholder questionnaire, the results of which are summarized below:

- Kincardine Minor Soccer would use 12.5 hours per week for rec and minor soccer from October to May, with an expected increase with
  more rep teams coming online and access to more field time, totaling 400 hours
- Kincardine Adult Soccer would use 9 hours per week from November to April, totaling 216 hours
- Kincardine Minor Baseball would use 20 hours a week October to May, totaling 640 hours
- Kincardine Football Association would use 5 hours a week October to May, totaling 160 hours
- RIpley Minor Baseball and Soccer would use 10 hours a week October to May, totaling 320 hours
- Saugeen Shores Baseball use 12.5 hours per week totaling 400 hours

In total, there are 2816 (1408 x two fields) primetime hours during the fall - spring periods and there is demonstrated demand from these organizations to achieve greater than 60% weekly overall primetime utilization of a two field sports dome. Huron Kinloss Minor Baseball alone signaled demand for 23% of total available field capacity, or almost half of the total hours required to reach 50% capacity use – the minimum acceptable utilization rate. Huron Kinloss Minor Baseball has further noted that access to these fields would allow them to grow, which would increase there field utilization, which they currently have lost all access too with there current indoor situation. These calculations are highlighted in Table 5. Prime time is defined as 4 hours per weekday (e.g., 6:00pm to 10:00pm) and 12 hours per weekend day (e.g. 8:00am to 10:00pm).

Multiple sports leagues would also be ran in-house, including competitive mens, women and co-ed soccer along with wiffle ball. These leagues would account for a total of 13 hours a week October to May, totaling 416 hours. These leagues would bring in revenues of approximately twice the amount of a typical field rental.

In total, 2552 out of 2816 primetime hours will be allocated to these sports organization and in-house sports leagues, taking up over 90% of field capacity during prime time hours from October - May. This will leave 264 hours, or 8.25 hours a week, open to community or non-resident field rentals for things such as events, birthday parties, tournaments, ect.

TABLE 5: DOME TURF FIELDS PROJECTED UTILIZATION (PRIMETIME)

	Total Hours	otal Hours Per Week	Weekly Overall Utilization		
	iotai nouis		50%	60%	75%
October - May					
Available Primetime	2816	88	44	52.8	66
Huron Kinloss Minor Baseball	640	20	20	20	20
Huron Kinloss Minor Soccer	400	12.5	12.5	12.5	12.5
Huron Kinloss Adult Soccer	216	9	9	9	9
Huron Kinloss Football Association	160	5	5	5	5
Ripley Minor Baseball and Soccer	320	10	10	10	10
Saugeen Shores Baseball	400	12.5	12.5	12.5	12.5
In-house Sports Leagues	416	13	13	13	13
Total	2624	82	69.5	69.5	69.5
% Primetime		93%	186%	136%	109%

### DOME OPERATING BUDGET SCENARIOS



### PROJECTED REVENUES FROM SURVEY RESPONDENTS

Fall to Spring	Total Revenue
Primetime Hours	
Youth Sports	\$132,880
In-house Leagues	\$156,600
Tournaments	\$12,800
Total Revenue	\$262,280

Pickleball	Total Revenue
summer memberships	\$20,000
winter memberships	\$90,000
Drop-ins	\$12,000
Fall League	\$3,100
Winter league	\$3,100
Tournaments	\$13,000
Total Revenue	\$141,200

Daytime Camps	Total Revenue
PD Days	\$14,000
Winter Break	\$18,000
march break	\$10,000
Summer Camp	\$240,000
Total Revenue	\$282,000

Batting Cages	total revenue
Huron Kinloss Minor Baseball	\$24,000
Ripley Minor Baseball	\$400
Saugeen Shores Baseball	\$16,000
Walkins	\$28,000
Total Revenue	\$68,400

Private Lessons	Total Revenue
Group Pitching	\$10,800
Group Hitting / Fielding	\$36,000
Group Soccer	\$36,000
Private Baseball	\$3750
Total Revenue	\$86,550

Total Revenue	\$840,430
---------------	-----------

### UNREALIZED REVENUE POTENTIAL

Open Primetime Hours	Average Price / Hour	Potential Revenue
755	\$110	\$92,050
Open Daytime Hours (Non-Primetime)	Average Price / Hour	Potential Revenue
1600	\$60	\$96,000
Open Batting Cage Hours	Average Price / Hour	Potential Revenue
5900	\$40	\$236,000
Total Potential Revenue (Projected Revenue + Open Hours)		\$1,264,480

### ESTIMATED CAPITAL DEVELOPMENT COSTS

Dome Costing	
77,000 sq ft dome and concrete base	\$4,158,000
Turf Cost	
7v7 + baseball infield + warm up	\$195,048
7v7 + baseball infield + warm up	\$195,048
Batting Cages	\$45,760
Flooring	
Dome Floor	\$70,602
Equipment	
Batting Cages	\$32,000
Soccer nets	\$6,000
Miscellaneous	\$5,000

Front Building	
Brick Building	\$785,400
Washrooms	\$20,000
Changeroom	\$24,000
Reception desk	\$2,000
Miscellaneous	\$10,000
Pickleball	
Courts	\$32,000
Nets and posts	\$5,000
Park	
Playground	\$40,000
Parking Lot	
Parking Lot	\$66,000.00







# Revitalizing Park Spaces for a Thriving Community

We propose an exciting partnership with the Township of Huron-Kinloss to breathe new life into an underutilized park space. The facility is fully compliant with current zoning, as confirmed by the last Chief Building Official, ensuring minimal risk to the township.

Through this partnership, Huron-Kinloss will benefit from:

- Increased Revenue: A lease agreement will generate more income than the park currently provides.
- Enhanced Park Features: Upgraded amenities will improve the space for residents and visitors alike.
   This aligns seamlessly with the park's master plan, enhancing the area without requiring township investment.
- Zero Financial Burden: We will cover all associated upgrade costs, offering the township a win-win
  opportunity.

Together, we can transform this space into a vibrant hub for the community while advancing the township's strategic goals. We look forward to the opportunity to collaborate and create a lasting positive impact for Huron-Kinloss.

Confidential

# THANK YOU

FOR MORE INFORMATION PLEASE CONTACT:

BRANDON KUSHNIR (416) 624 - 7742 KUSHNIR\_88@HOTMAIL.COM



