



Edmonton Arena Study December 2010

-Summary Report -



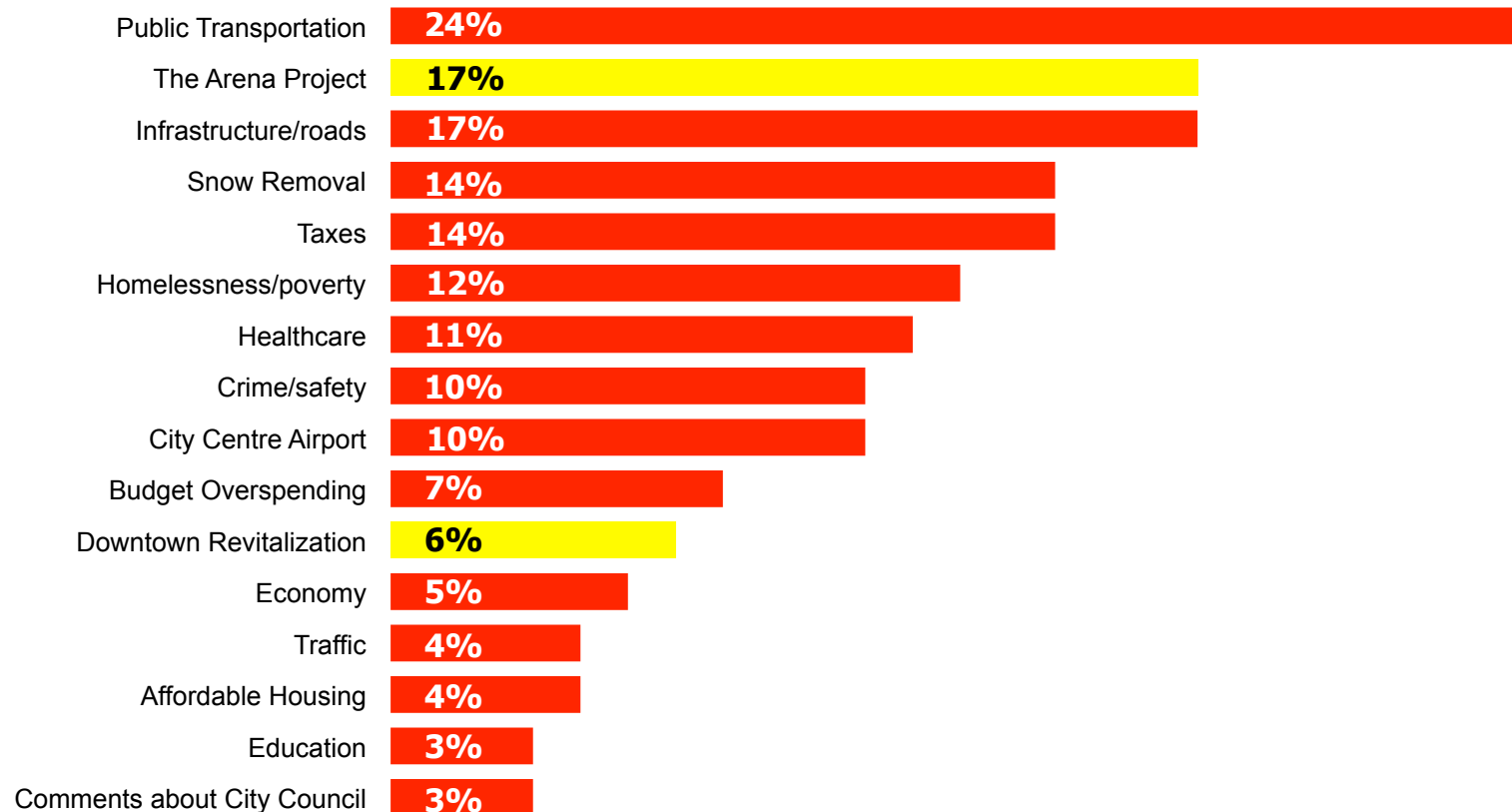
January 6, 2011

Methodology

- Questions fielded in the City of Edmonton December 20-December 23, 2010
- City-wide survey of 800 adult Edmontonians
- Data weighted to reflect accurate gender balance
- Random sample, representative of adults in the City of Edmonton
- Survey of City of Edmonton residents only, as arena proposal is before Edmonton City Council
- Margin of Error: +/-3.5 percentage points, 19 times out of 20
 - Caution should be used when examining sub-samples, as the margin of error increases with smaller base sizes.

Most Important Issues Facing The City of Edmonton

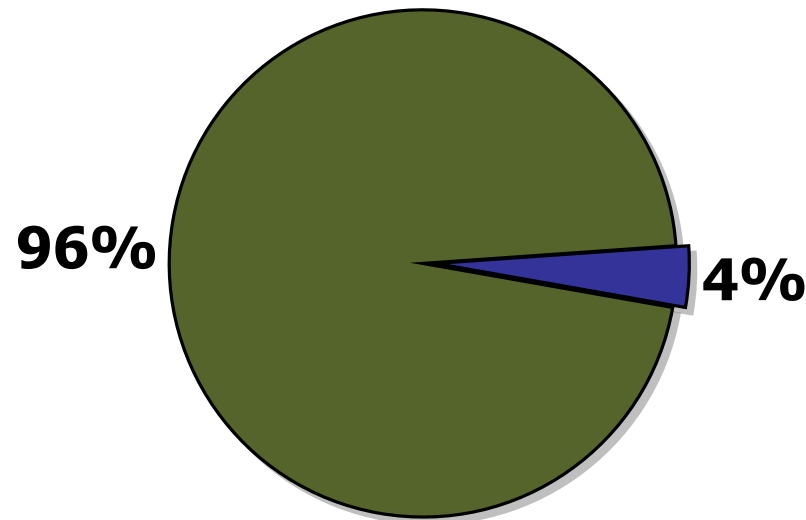
Q1/2. "What is the most important issue facing the City of Edmonton?" "Are there other issues of importance you think the City should address?" TOTAL UNPROMPTED MENTIONS



Awareness of the New Arena Issue

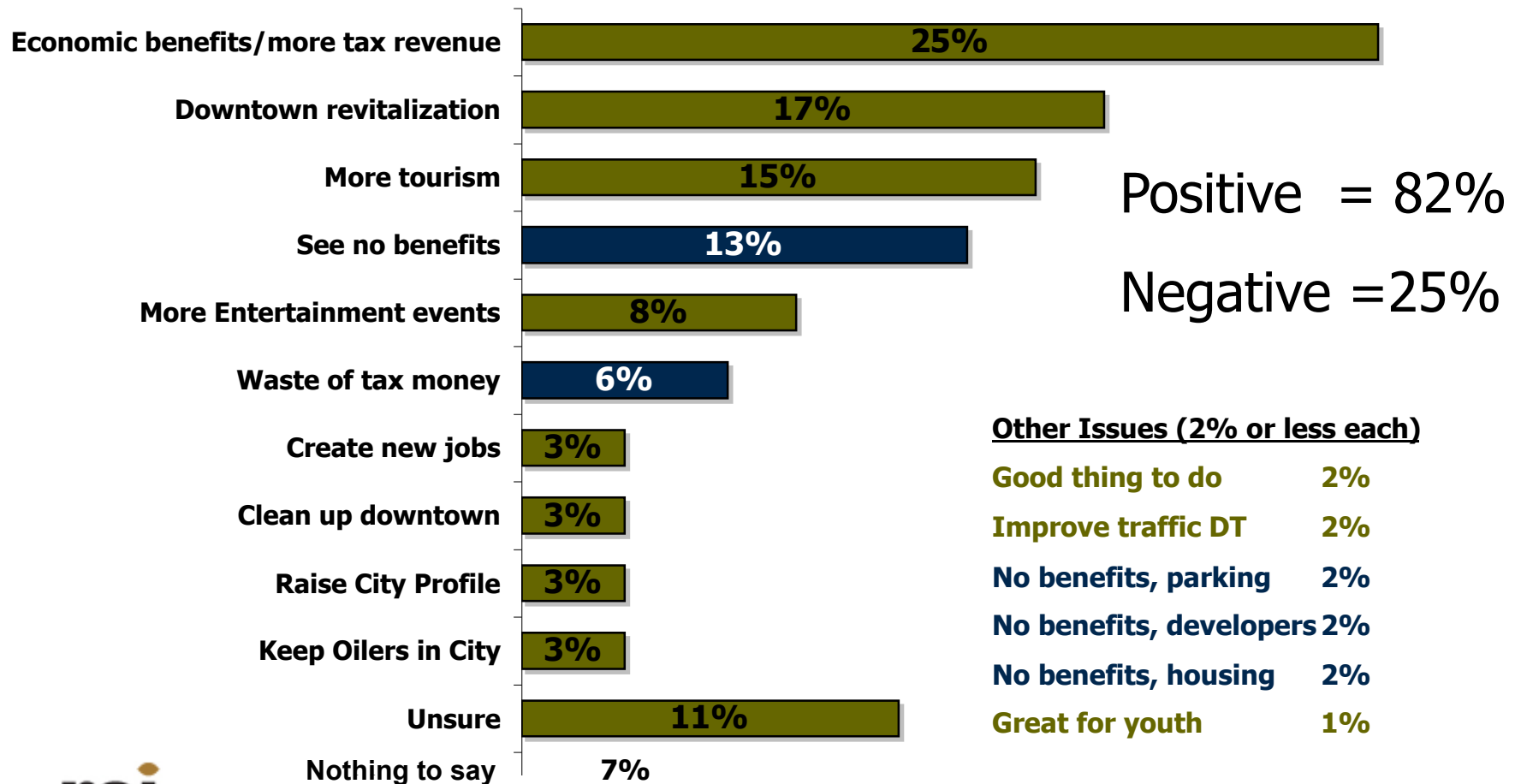
Q3. "Have you read, heard or seen anything in the past year about a proposed plan for building a new hockey arena in downtown Edmonton?"

■ Yes, Aware ■ No, Unaware



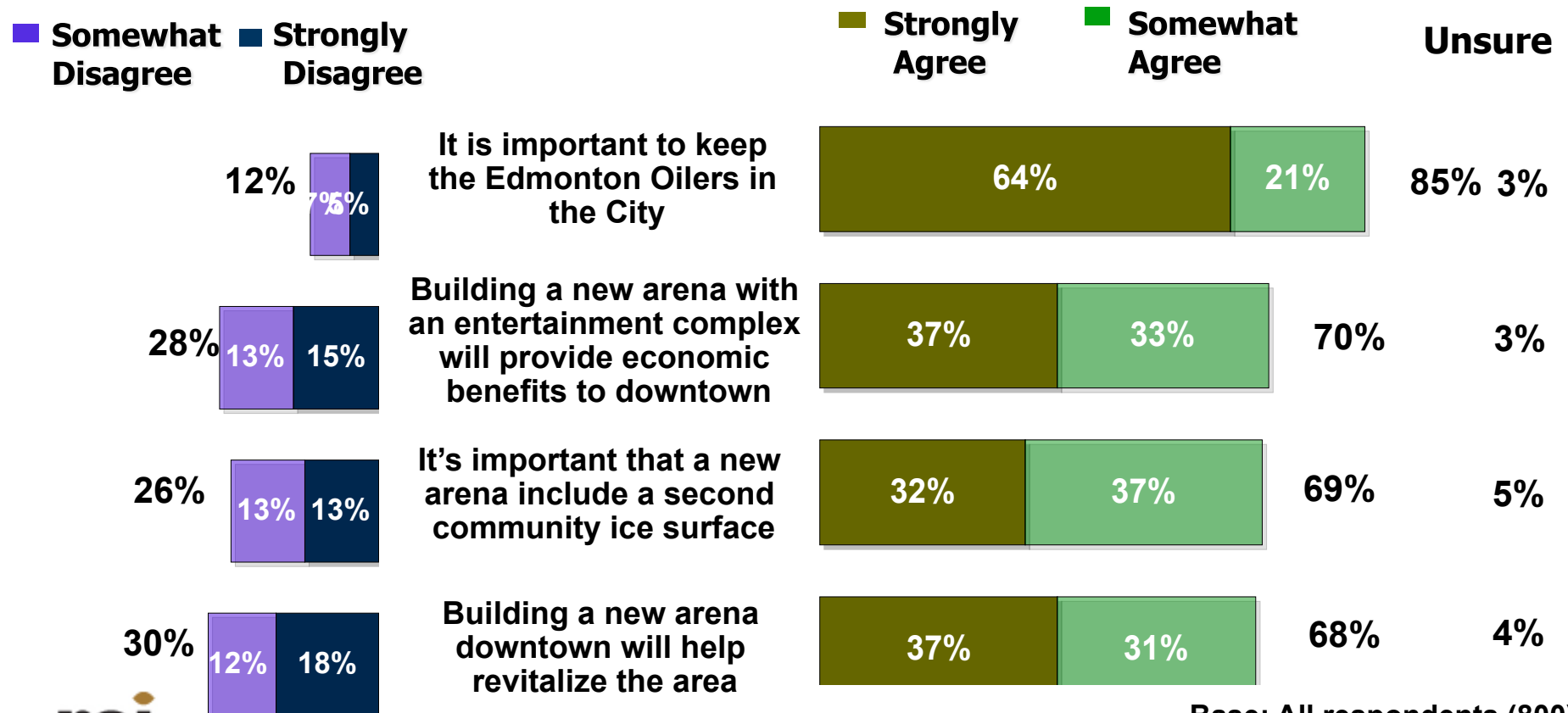
Perceived Benefits of Building a New Downtown Arena

Q4. "What benefits, if any, do you think building a new arena in downtown Edmonton would bring for the City?" TOTAL UNPROMPTED MENTIONS



Attitudes Toward Benefits of Building a New Arena Downtown

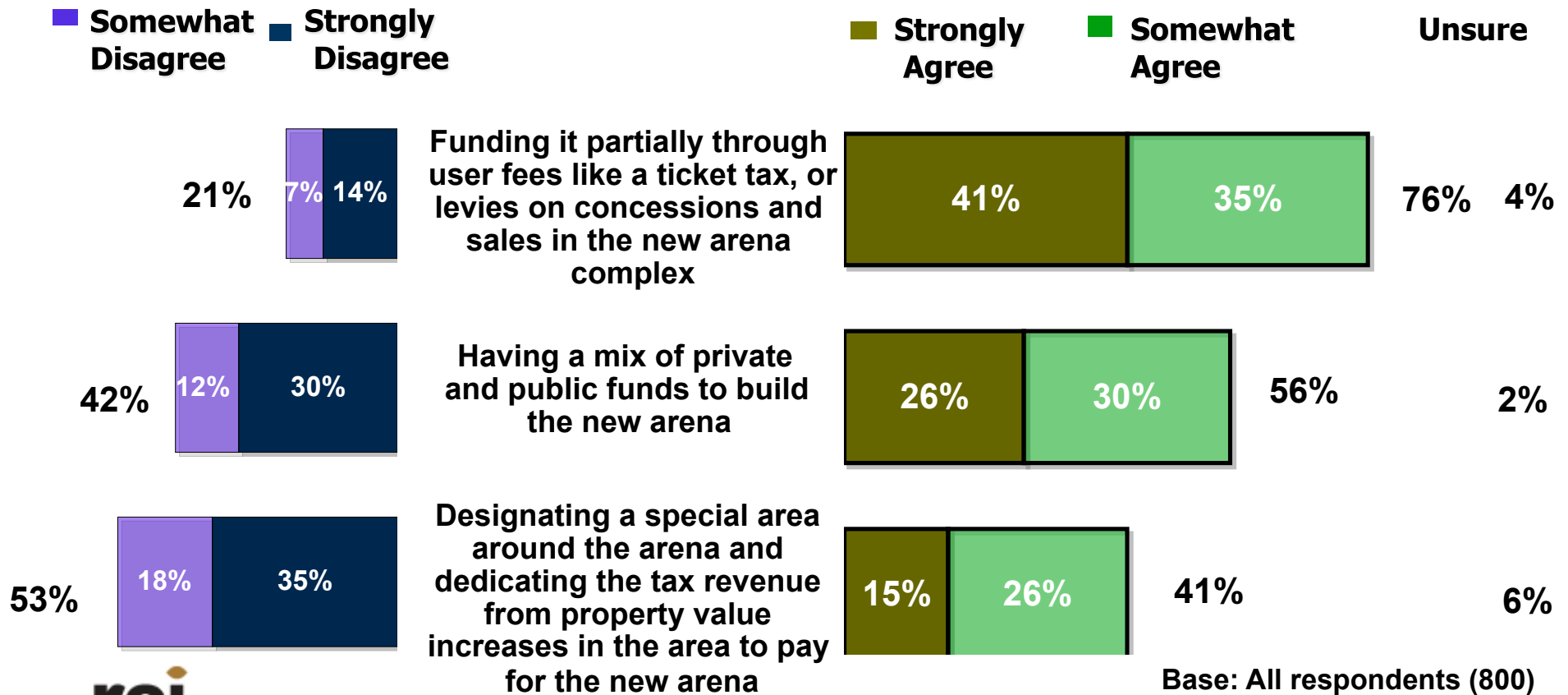
Q5. "There are many different opinions about building a new arena in downtown Edmonton. For each of the following statements I'd like to know if you agree or disagree and is that strongly or somewhat?"



Base: All respondents (800)

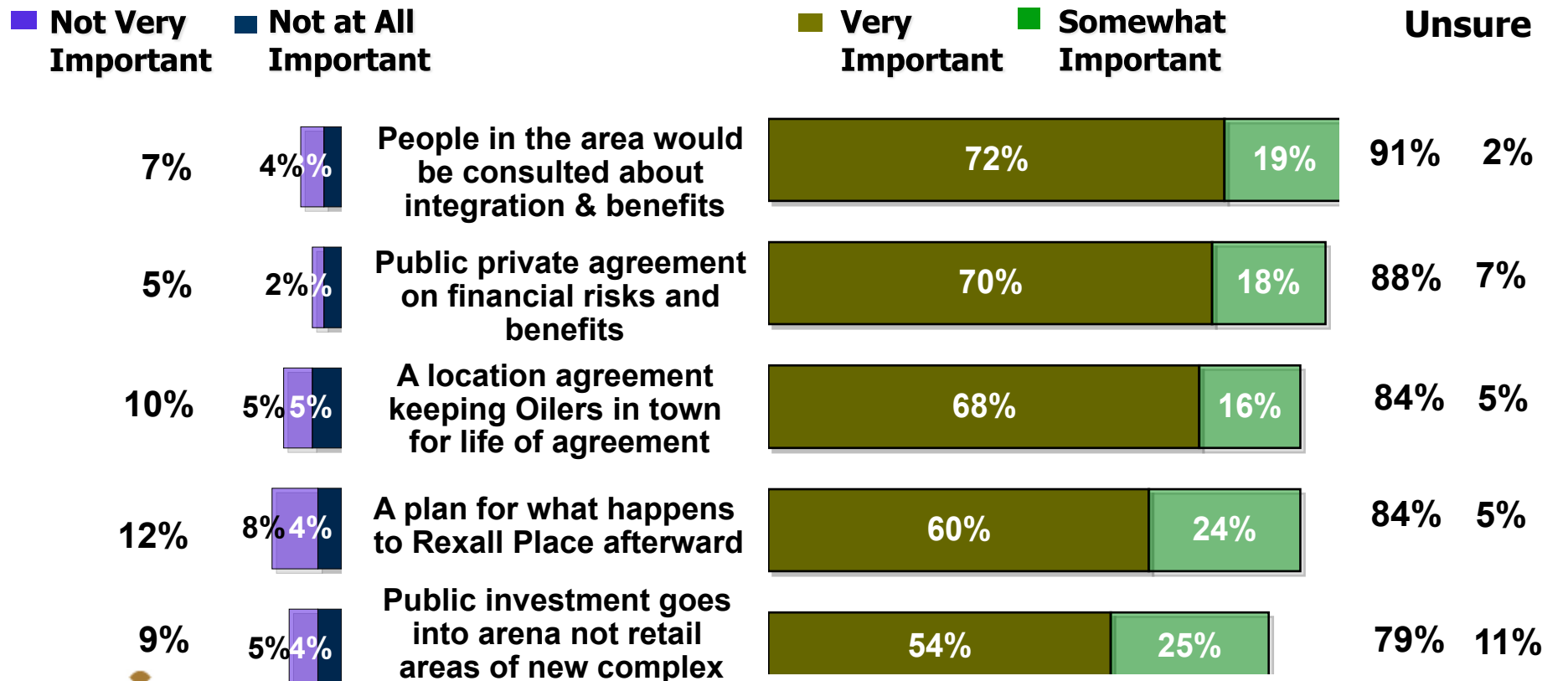
Attitudes Toward Funding Options for a New Arena Deal

Q6. "Do you personally support or oppose some of the following ideas about how to fund the building of a new downtown arena?"



Assurances Desired to Build a New Arena Downtown

Q8. "When the City of Edmonton conducted consultations about the idea of building a new arena, some people stated they would like to see certain assurances made. For each of the following assurances that could be made, do you think it is very important, somewhat important.....?"

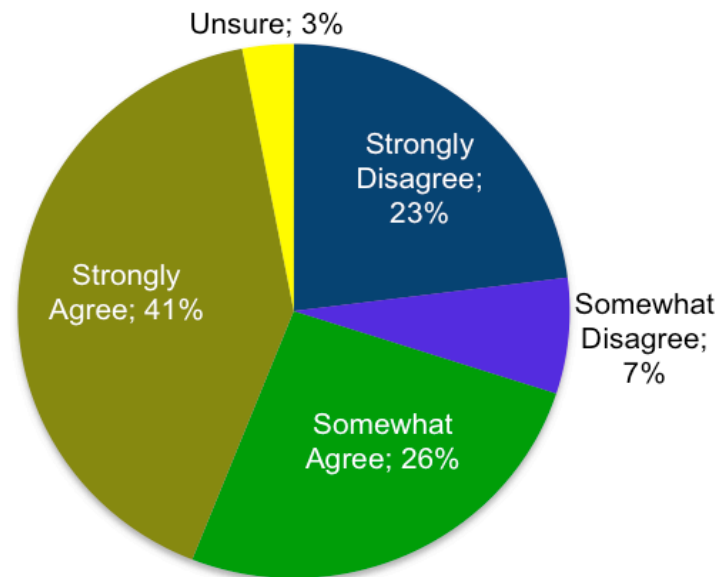


Base: All respondents (800)

Arena Support as Long as Taxes do not Increase or Infrastructure \$ is not Used

Q7. "If the project were to proceed, do you think the City of Edmonton should contribute funds to a new downtown arena as long as it does not raise the property tax rate or reallocate infrastructure funds?"

**Representative Telephone Survey
December 2010**



**Online consultation conducted October-
November 2010 with almost 29,000 submissions
revealed a very similar response:**

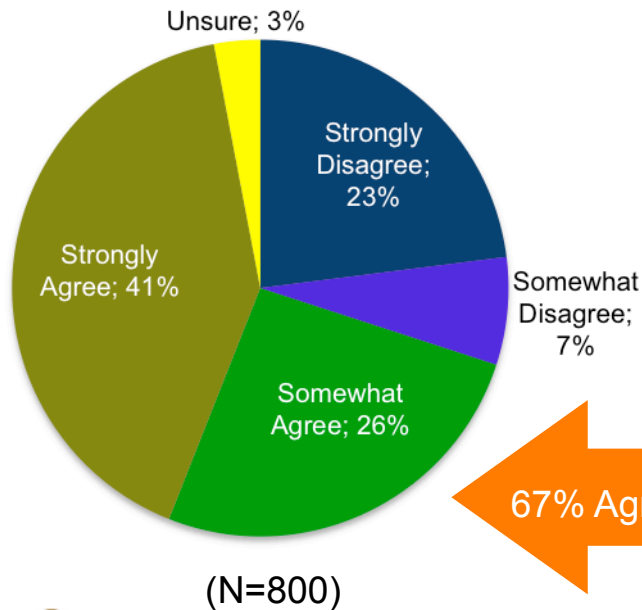
- **41% said the City of Edmonton should definitely proceed (N=28,975)**
- **41% strongly agreed in the representative telephone survey (N=800)**
- **Overall, 60% said the city should proceed in the online consultations**
- **Overall, 67% agreed the City should contribute funds to a new arena**

Arena Support -Qualified and Unqualified-

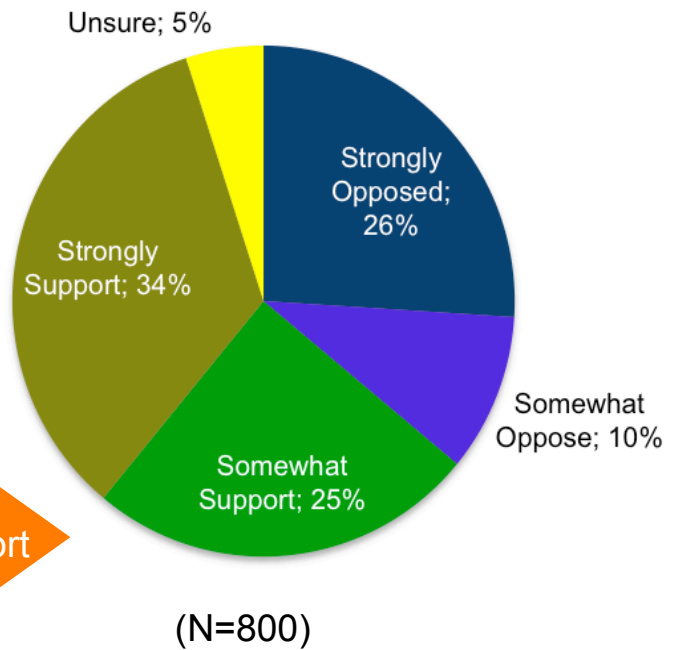
Q7. "If the project were to proceed, do you think the City of Edmonton should contribute funds to a new downtown arena as long as it does not raise the property tax rate or reallocate infrastructure funds?"

Q9. Considering all of the factors we have discussed, such as the cost, the potential economic impact and the agreement that might be reached between private and public sector partners, overall do you support or oppose building a new downtown arena?

**Q7. Representative Telephone Survey
(Qualified) December 2010**



Q9. Representative Telephone Survey (Unqualified) Dec 2010



1. Awareness and Importance

- On an unprompted basis, one in five people mention the issue of building a new arena (17%) and a further 6% point to downtown revitalization as a key issue facing the City of Edmonton.
- The only issue of greater importance is public transportation (24%), and road infrastructure (17%) is of equal importance.
- On a prompted basis, awareness of discussions about building a new arena are almost universal (96%), having increased from 87% in 2008.
- The importance of the Oilers hockey club to Edmonton is very widely acknowledged (85% agree it is important to keep them in the City).

2. Perceived Benefits of a New Downtown Arena

- Attitudes toward the project are generally positive, with 82% of the unprompted comments pointing to benefits, compared to a total of 25% negative comments.
- Perceived benefits include the economic impact (25%), downtown revitalization (17%), and increased tourism (15%), as well as more entertainment events (8%).
- Most people see the new arena bringing economic benefits (70%), and downtown revitalization (68%); others think it's important to include a 2nd community ice surface (69%).
- Among the negative comments, many were general in nature (13%), as well as wasting taxpayer's money (6%), and other specific concerns about the lack of benefits (6%).

3. Attitudes Toward Funding Options

- In terms of **funding options**, the idea of user pay features (like a ticket tax and concession levies) is widely supported (76%).
- On the other hand, reaction to a designated community revitalization levy, while not fully explained due to its complexity, is divided (41% support, 53% oppose).
- Having a mix of private and public funds to build the new arena is supported by a majority of people (56%).

4. Assurances Desired

The telephone survey tested reaction toward a number of assurances mentioned in the public consultations. Assurances people would like to see put into place before building a new arena include:

- consulting with the local community about benefits and integration of the project (91% say that is important),
- risk and benefit sharing between the private and public partners (88%),
- a location agreement for the Oilers (84%),
- a plan for Rexall Place afterward (84%), and
- assurances that any public funding does not go into the retail components of the project (79%).

5. Assessing Support

- When asked if the City should contribute funds as long as property taxes are not raised and infrastructure funds are not utilized, 67% support the City contributing funds toward building a new arena, while 30% oppose and 3% are unsure.
- This compares closely to the online survey results, in which 60% expressed support for building a new arena.
- When all factors are considered, from the cost to the potential economic impacts and partnership agreements that would have to be reached, 59% support building a new arena, while 36% oppose the idea and 5% are unsure.
- Men (66%) are more supportive of a new arena than women (52%), though both genders are in favour.

Overall Summary

- Attitudes toward building a new arena with City support are generally positive, due in large part to the perceived economic benefits and the expected impact on revitalization of downtown.
- People support user pay features such as a ticket tax and concession levies, but are divided over a potential community revitalization levy as part of the overall funding model. It will be important to fully explain the CRL aspect of the funding model, and provide opportunities for surrounding communities to have meaningful input into how they would benefit from the project.
- If certain assurances are in place to share the risks and benefits between private and public partners, and if a team location agreement is part of the deal, support for building an arena will remain strong. Other ingredients for maintaining support include having a plan for Rexall Place afterward and ensuring that public funding does not go into the retail components of the project.