

Appendix B: Supporting Information

i. Downtown Master Plan

In 2012, Greater Sudbury Council approved the Downtown Sudbury Vision, Plan and Action Strategy (Downtown Master Plan) The Downtown Master Plan (DMP) functions as the blueprint to guide the revitalization of Greater Sudbury’s downtown, detailing a series of actions and initiatives necessary for this transformation. Since 2012, successive Councils have taken steps to implement the DMP. In more recent years, City Council has approved public realm revitalization project such as the Tom Davies Square Redesign, Minto Street Civic Corridor (North Phase), Brady Green Stair and Brady Street Underpass projects. City Council has similarly approved historic investments in the Downtown Community Improvement Plan to stimulate private sector investment in the building stock downtown.

Although Downtown Sudbury is uniform by name, it is highly diverse in its function and characteristics. The DMP identifies seven downtown districts, one of which is the South District. The South District is envisioned as a regional destination for fun, arts, events and recreation. It highlights synergies to established businesses, Memorial Park, and includes the Sudbury Theatre Centre. A larger development in the South District continues to realize the vision of the DMP.

ii. Downtown South District Visioning Session Outcomes

Recently, staff held an internal visioning session related to the South District of Downtown Sudbury. Using the Downtown Master Plan as a foundational document, the group identified strengths, weakness, opportunities and threats and updated the vision and key development objectives for the district.

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none">• Part of a vibrant downtown• Utility servicing in place• Supported by strong, established businesses along Elgin Street• City controls most of the property• Highly visible• Current zoning allows for maximum possibilities• Financial incentives in place through Community Improvement Plan (CIP) and other supporting policies	<ul style="list-style-type: none">• Stigma of downtown and perceived safety issues• Lack of residential density nearby• Railway is a dominant feature• Homelessness and opioid crisis prominent within the district or close proximity• Property values depressed/lack of private sector investment• Soil conditions• Hard boundaries formed by Brady, Paris and Elgin Streets create an isolated district

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Council’s commitment • Enough real estate to support multiple facilities • More people translates into greater feeling of safety • Cultural Hub at Tom Davies Square creates possible synergies with district • Proposed transit hub in close proximity to district • Somewhat of a “blank slate” • Strategic public realm improvements that will lead to street calming and better connectivity • Creating higher density residential properties while leveraging current funding opportunities 	<ul style="list-style-type: none"> • Vulnerable populations and lack of plan to address • “Biting off” more than we can handle and realize nothing • Long-term trends related to office space, low demand • Service cluster for social services • Stagnant event and live performance market • Realizing a vision maybe interrupted or abandoned as result of changing Council priorities

iii. South District - Vision Statement

While the vision articulated below will need to be validated and modified based on the results of community engagement from the upcoming Downtown Master Plan update, the vision statement below imagines how a future South District might look and feel.

“The South District of Downtown Sudbury is envisioned to be a regional destination for arts, culture, sporting and entertainment events and a place for vibrant urban living in a distinctively northern environment.

The South District will be anchored by an arena and event venue and the Sudbury Theatre Centre, energizing and activating the area with culture, sports and entertainment offerings.

Unique boutique retail and dining opportunities, enhanced and attractive public spaces and amenities for residents will support a convenient urban lifestyle for individuals and families living in newly constructed, modern multi-residential housing. This will be supplemented by superior hospitality offerings that welcome visitors from the region and beyond.

Traffic-calmed and beautifully landscaped streets will make the South District easily walkable and accessible to adjacent downtown neighbourhoods, and the city as whole, with public transit and active transportation corridors servicing the area.”

iv. South District - Key Development Objectives

Foster Community Pride – An animated and memorable place that attracts people to live, work, play and visit.

Increased Downtown Visitation and Activity - Create a destination that leads to increased visitation and activity at all times of day, spurring economic growth and prosperity now and in the future.

Improved Connectivity - Spaces and places are easy to access by walking, biking, public transit or driving and easily connect people to other areas of Greater Sudbury's historic downtown.

Establish Architectural Landmarks and Dynamic Spaces - Architecture and public spaces that are celebrated, outstanding and of enduring quality.

Demonstrate Leadership in Sustainability - Inspiring indoor and outdoor spaces that demonstrate climate change adaptation and mitigation strategies and align with the goals set out in the Community Energy and Emissions Plan (CEEP) and the Community Climate Change Adaptation Plan (CCCAP).

Proactively Enhance Accessibility - Realize the City's commitment to making its spaces, programs and services accessible to all citizens now and for future generations.

Livability - Provide multi-residential housing, retail, entertainment and cultural opportunities along with other amenities to make the South District a desirable place to live.

v. Arena Renovation Examples from Other Communities

Kitchener, ON - The Kitchener Memorial Auditorium Complex (The Aud), was constructed in 1951. The complex includes the Dom Cardillo Arena, two smaller community arenas (the Kinsmen Arena and Kiwanis Arena), the Jack Couch Stadium (baseball park), Centennial Stadium (track and field, soccer, and football), and a skatepark outside the stadium.

The Dom Cardillo Arena is the home of the OHL's Kitchener Rangers and offers a seating capacity of 7,234 and a total capacity of 7,777 including standing room. The facility also underwent a significant refurbishment in 2012. The refurbishment project was phased over seven stages to maintain the OHL schedule.

The complex refurbishment required the Design Build contractor to first build on top of the existing flat roof over the Rangers dressing room while the dressing room was occupied during the hockey season. Then, within a small window of time, the new structure punctured through the existing building envelope to tie the new structure into the former, while concurrently pulling out the old flat roof and constructing a new roof on top. The project which was originally estimated to cost \$9 million dollars was completed for \$12 million dollars, and included expanding the seating capacity by 968 seats, 26 luxury suites, new concourses, new mechanical systems, medical and training facilities, dressing rooms, media areas, and concessions and washrooms.

John MacDonald Architect was later commissioned to design accessibility upgrades for The Aud to address several deficiencies, namely: barrier-free path of travel, emergency egress, and fire separation.

Since January 2020, the City of Kitchener has been discussing a replacement for The Aud. The major renovation in 2012 was envisioned as part of a 10-year plan to replace the facility. Major factors that are pressing the need for an entirely new facility appear to be the old-style seating

and sightlines, upcoming capital renewal costs, constraints for both spectators and event organizers, and a location that is not central for the community.

Winnipeg, MB - Canada Life Centre (formerly MTS Centre and Bell MTS Place) is home to the NHL's Winnipeg Jets and the AHL's Manitoba Moose. The facility was constructed in 2004 for a cost of \$133.5 million and has a capacity for hockey of 15,321.

In 2001, Eaton's which was considered to be an iconic fixture of the Winnipeg downtown closed its doors for the final time. The City of Winnipeg studied potential uses for the Eaton's building and site in an effort to revive the City's struggling and declining downtown. Winnipeg Council deemed the most viable and impactful project to kickstart a revival of the downtown was a new build arena project. This decision created community controversy and resistance, and the Save the Eaton's Coalition was launched. The old Eaton's store was demolished the following year in 2002 to make way for the new entertainment complex.

The Manitoba Moose were the original anchor tenant of the former MTS Centre. However, the construction of the new facility instantly gave traction to the conversation of bringing an NHL team back to Winnipeg. In 2011, it was formally announced that the purchase and relocation of the Atlanta Thrashers organization was complete, and the Winnipeg Jets became an NHL franchise once again.

In preparation for an NHL franchise, renovations costing approximately \$17 million were completed to achieve the NHL's standards. Renovation included construction of additional press boxes, lighting upgrades, rink glass upgrades, and a renewed ice refrigeration system. A project beginning in 2015 included for \$14 million (budget \$12 million) of additional improvements completed on the concourse, a new video board was installed, and 278 premium seats were added to the upper level.

Ann Arbor, MI - Yost Arena was constructed in 1923 and is home to the University of Michigan (U of M) Wolverines hockey team. Originally constructed to host U of M basketball, Yost was converted to an ice hockey rink in 1973. In recent years the arena has undergone several renovation and renewal projects to enhance the spectator experience and prolong the life of the facility.

A \$1 million project replaced the rink floor and refrigeration unit in 1992. A desiccant dehumidification system was also installed at this time.

In 1996, a \$5.5 million renewal was performed to modernize Yost Arena. As part of the renovation the seating bowl was reconfigured to improve sight lines throughout the facility. The renewal also included a new pro shop, concession stands and restrooms, new locker rooms, and an improved lobby.

Another \$1.4 million renovation project was completed in 2001 to add a club-level balcony to the east side of the arena. The new balcony comes out over existing seating and provides 300 new seats. In 2006 a \$2 million project expanded the locker rooms, also making entering and exiting the ice easier for both teams.

The most recent renewal project of Yost Arena began in 2012. The \$16 million dollar renovation (\$14 million budget) reduced the fixed seating capacity from 6,200 to 5,800 by utilizing the space to increase the quantity of premium seating from 300 to 500 and improving the concourse. Although fixed seating decreased, premium seating increased. Another reason for

the fixed seating decrease is that seating on the west side of the arena was converted to accommodate the media, and the former media box was turned into a luxury boxes.

Due to the arena size constraints, all non-premium seating is bleacher style. “It’s such a tiny container you cannot [have seat backing]” – Matt Rossetti, principal with Rossetti Architecture Inc. (the firm that designed the renovation). However, the 2011 renovation did include the required ADA accessible seating.

An additional project completed in 2011 replaced the scoreboard in Yost Arena with a new LED scoreboard with nine video boards. The scoreboards were part of a larger \$20 million project to replace the scoreboards at Yost Arena (U of M Hockey), Crisler Arena (U of M Basketball – 1967 & 12,707 seats), and Michigan Stadium (U of M Football – 1927 & 107,601 seats).

vi. Private Sector Participation

Market competition from other jurisdictions is related to a number of real and/or perceived factors which the City can influence, like incentive programs. However, when considering market competition from other jurisdictions, the geographic location of Greater Sudbury needs to be considered and normalized when assessed against comparator jurisdictions in southern Ontario. For instance, when comparing Greater Sudbury to Kingston or Guelph which share similar demographics, these southern Ontario cities have significant advantage due to their proximity to Toronto/Ottawa, many other small/medium sized cities, key infrastructure and the US border, which all provide a much greater market opportunity for developers.

Consultation with the private sector and findings from precedent examples have revealed that greater success can be realized if the City of Greater Sudbury makes an effort to reduce risks for development. This can be achieved in a number of ways, however, primary to this is that the City undertakes development due diligence on individual sites to understand and quantify issues (and costs) which would impact development of a site (including environmental, geotechnical, site servicing and/or other constraints). This information would then be provided to prospective purchasers/developers as part of the procurement process. Moreover, transparency in terms of risks associated with development, outlining the City’s plans to mitigate the risks as well as willingness to engage in an open and collaborative partnership with the private sector would provide assurance to developers.

Recent engagement with the private sector suggests that the City should strategically prioritize individual parcels, offering first the site which it feels would provide a developer the greatest chance of development success. The City may need to offer higher levels of incentives (to help offset development risk, including offering land at a low cost, assuming site remediation costs, ensuring that adequate in-ground services are available to the site, etc.). Furthermore, it was also noted that in order to kick-start the redevelopment of the South District, the City may need to entice developers or investors to acquire a site (and develop that site), and that the City’s offering process should be both “simple and compelling”. It was acknowledged that the first project will have the greatest overall risk, and if or when success can be demonstrated, it could enhance the attractiveness of other sites or future site offerings. Private sector feedback indicates that the City should consider fully committing to build and or renovate the event centre prior to seriously undertaking an attraction strategy.

Council's updated Strategic Plan 2019-2027 (Revised 2023) already begins to align with this advice. Within Asset Management and Service Excellence, objective 1.4: Reinforce Infrastructure for New Development identifies a need to demonstrate the creative use of Community Improvement Plans (CIPs) and Development Charges to incentivize economic growth. Furthermore, the pursuit of a larger redevelopment in the South District begins to address a number of objectives outlined in Economic Capacity and Investment Readiness.

vii. Economic Impact Potential

Economic impact refers to the employment and the value-added GDP impacts experienced by residents of Greater Sudbury, and across the province. Employment impacts are measured in jobs. This includes full-time, part-time, seasonal employment, as well as those who are employed and self-employed. Value-added (also referred to as Gross Domestic Product) measures the economic value created through the production of goods and services and is one of the most used indicators of economic activity. Value-added impacts consist of the following:

- Labour income, which includes wages and salaries and supplementary labour income (benefits) to workers.
- Business income, which includes net before-tax income of unincorporated business and corporate business income before deductions for depreciation, interest and corporate income taxes.
- Government income, which consists of indirect taxes as well as goods and services purchased from the government. Indirect taxes include taxes such as sales taxes and property taxes but exclude personal income taxes and corporate income taxes.

New Spectator Facility

The value-added GDP impacts associated with the initial \$215 million in capital investment into a new spectator facility has been estimated at \$57 million on a direct and indirect basis. As a result of re-spending of labour income and/or profits earned in the direct and indirect industries, a further \$23.5 million has been estimated for induced impacts.

This results in an overall impact to GDP of \$81 million that can be expected for Greater Sudbury. Approximately, \$57 million will trickle down into wages and salaries. These wages will support 339 direct, 143 indirect and 160 induced jobs in Greater Sudbury, for a total of 642 jobs. The capital investment for development of a new spectator facility will contribute to total direct taxes of \$8.4 million in Greater Sudbury, with approximately \$4 million in federal taxes, \$3.5 million in provincial taxes and \$820,000 in municipal taxes.

Hotel and Convention Facility

The value-added GDP impacts associated with the initial \$30 million capital investment into a new hotel and convention facility has been estimated at \$8 million on a direct and indirect basis. As a result of re-spending for labour income and/or profits earned in the direct and indirect industries, a further \$3.3 million has been estimated for induced impacts.

This results in an overall impact to GDP of \$11.5 million that can be expected for Greater Sudbury. Approximately, \$8 million will trickle down into wages and salaries from the \$11.5 million in GDP. These wages will support 49 direct, 20 indirect and 23 induced jobs in Greater Sudbury, for a total of 92 jobs. The capital investment for development of a new hotel and convention facility will contribute a total of \$1.2 million in direct taxes in Greater Sudbury, with

approximately \$600,000 in federal taxes, \$540,000 in provincial taxes and \$113,000 in municipal taxes.

Parking Structure with Commercial Space

The value-added GDP impacts associated with the initial \$35 million in capital investment into a new parking structure with commercial space has been estimated at \$9 million on a direct and indirect basis. As result of re-spending of labour income and/or profits earned in the direct and indirect industries, a further \$3.7 million has been estimated for induced impacts.

This results in an overall impact to GDP of \$13 million that can be expected for Greater Sudbury. Approximately, \$9 million will trickle down into wages and salaries from the \$13 million in GDP. These wages will support 57 direct, 23 indirect and 26 induced jobs in Greater Sudbury, for a total of 106 jobs. The capital investment for the development of a parking structure with commercial space will contribute a total of \$1.3 million in direct taxes to Greater Sudbury, with approximately \$670,000 in federal taxes, \$555,000 in provincial taxes, and \$136,000 in municipal taxes.

Renovated Event Centre

The value-add GDP impacts associate with the initial \$112 million in capital investment into a renovated event centre has been estimated at \$30 million on a direct and indirect basis. As a result of re-spending of labour income and/or profits earned in the direct and indirect industries, a further \$12 million has been estimated for induced impacts.

This results in an overall impact to GDP of \$42 million that can be expected for Greater Sudbury. Approximately, \$30 million will trickle down into wages and salaries from the \$42 million in GDP. These wages will support 176 direct, 75 indirect and 84 induced jobs in Greater Sudbury for a total of 335 jobs. The capital investment for a renovated event centre will contribution a total of \$4.4 million in direct taxes to Greater Sudbury, with approximately \$2 million in federal taxes, \$1.8 million in provincial taxes and \$427,000 in municipal taxes.

When you consider the economic impacts described above, the South District Development Opportunity has the potential to realize significant economic benefits. If the South District were to realize the projects described above, the value added associated with a capital investment of \$280 million has been estimated at \$105 million to directly benefit Greater Sudbury. Of this \$105 million in GDP, an estimated \$75 million in salaries and wages will be generated to support approximately 840 jobs in Greater Sudbury, and a further \$11 million is estimated in direct taxes for Greater Sudbury.

Event Marketing Economic Impact Calculations

New Facility	# of Events	# of Hotel Room Nights	Economic Impact ₄
Concerts ₁	10	14,400	\$4,392,000.00
Family Shows ₂	6	6,960	\$2,122,800.00
Other Sports ₂	8	9,280	\$2,830,400.00
Other Entertainment ₃	8	4,000	\$1,220,000.00
Trade & Consumer Shows ₃	16	8,000	\$2,440,000.00
	48	42,640	\$13,005,200.00
Notes:			
1. Based on 7,000 attendance with 20% of which are from out of town and staying overnight			
2. Based on 5,800 attendance with 20% of which are from out of town and staying overnight			
3. Based on 2,500 attendance with 20% of which are from out of town and staying overnight for two nights			
4. Based on average overnight spending of \$305/hotel room night, as per 2022 Statistics Canada data from Travel Survey of Residents of Canada and International Travel Survey prepared by the Ontario Ministry of Tourism, Culture and Sport. https://www150.statcan.gc.ca/n1/daily-quotidien/230227/dq230227c-eng.htm			