

Hastings Park/PNE Public Opinion Survey

Prepared for City of Vancouver

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RESEARCH OBJECTIVES

The primary objective of the research is to collect feedback from a random sample of Vancouver City residents regarding the future of Hastings Park/PNE.

Specifically, the objectives are:

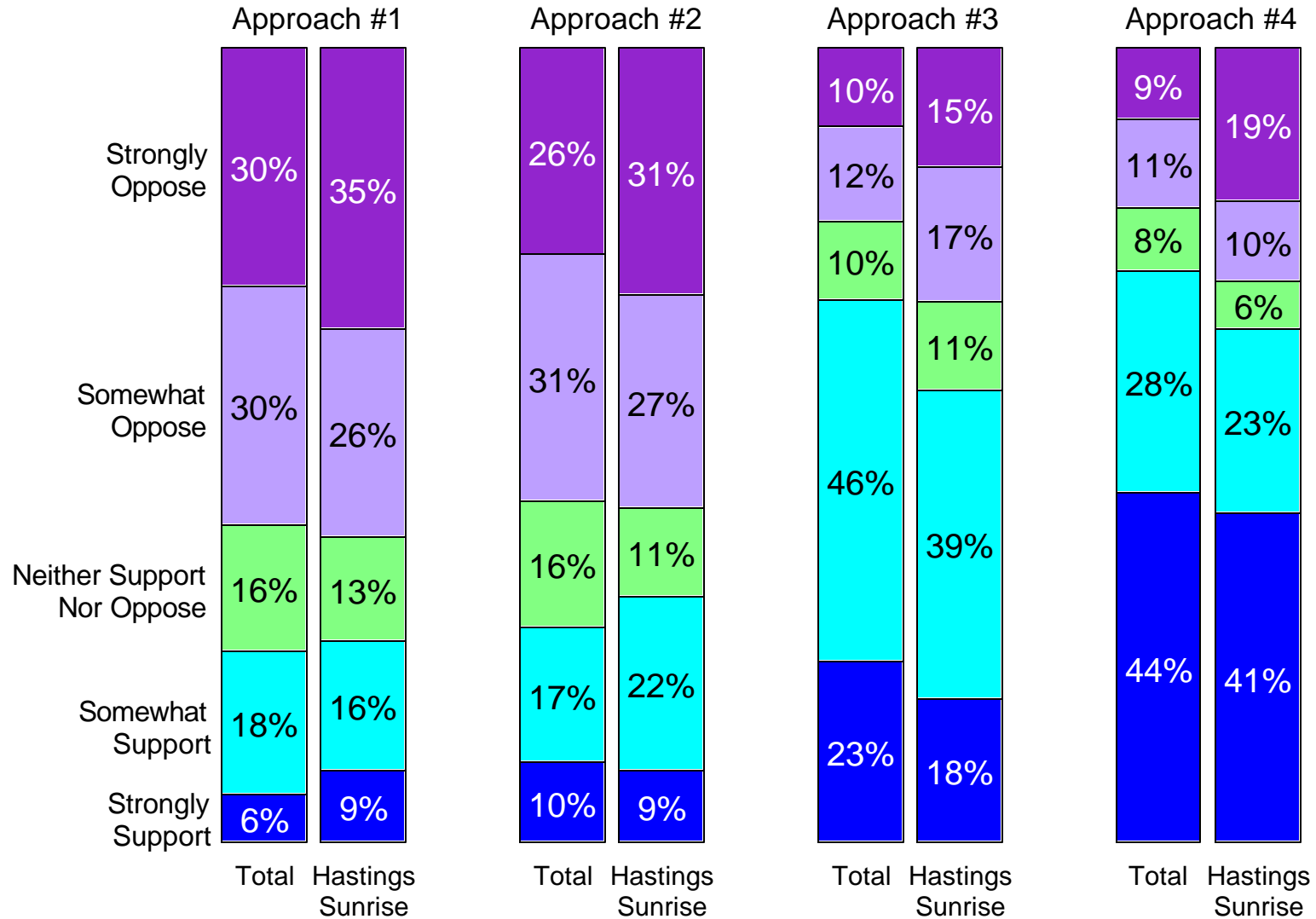
- To determine which of the 4 approaches residents prefer
- To determine which factors/variables that comprise the various approaches are most important to residents
- To measure preference for the path of the proposed stream/walkway
- To determine which issues regarding the addition of slot machines are most important to residents

METHODOLOGY

- Two-staged methodology was used. Stage 1 involved recruiting residents to agree to read an information sheet on the future of Hastings Park/PNE and then completing a follow-up telephone interview. Stage 2 was completing the interview. The information sheet was distributed in the April 25th & 28th editions of the Courier and was posted on the City's website.
- A total 670 residents were randomly recruited throughout the city and 251 were randomly recruited from within the Hastings Sunrise neighbourhood.
- In total, 478 follow-up surveys were completed including 167 with Hastings Sunrise residents. Overall, a 52% response rate was achieved.
- All data has been weighted by region (East, West, Hastings Sunrise) to the correct population proportions to ensure the results are reflective of the City as a whole.
- The maximum margin of error at the 95% level of confidence for the City sample of 478 is +/- 4.5% and for the Hastings Sunrise sample of 167 is +/- 7.6%.
- Interviewing was offered in English and Chinese. Chinese-speaking residents were couriered a Chinese version of the information sheet.
- Recruiting conducted April 15-21. Follow-up interviews conducted April 24-May 4, 2004.
- All fieldwork conducted from Synovate's Vancouver office.

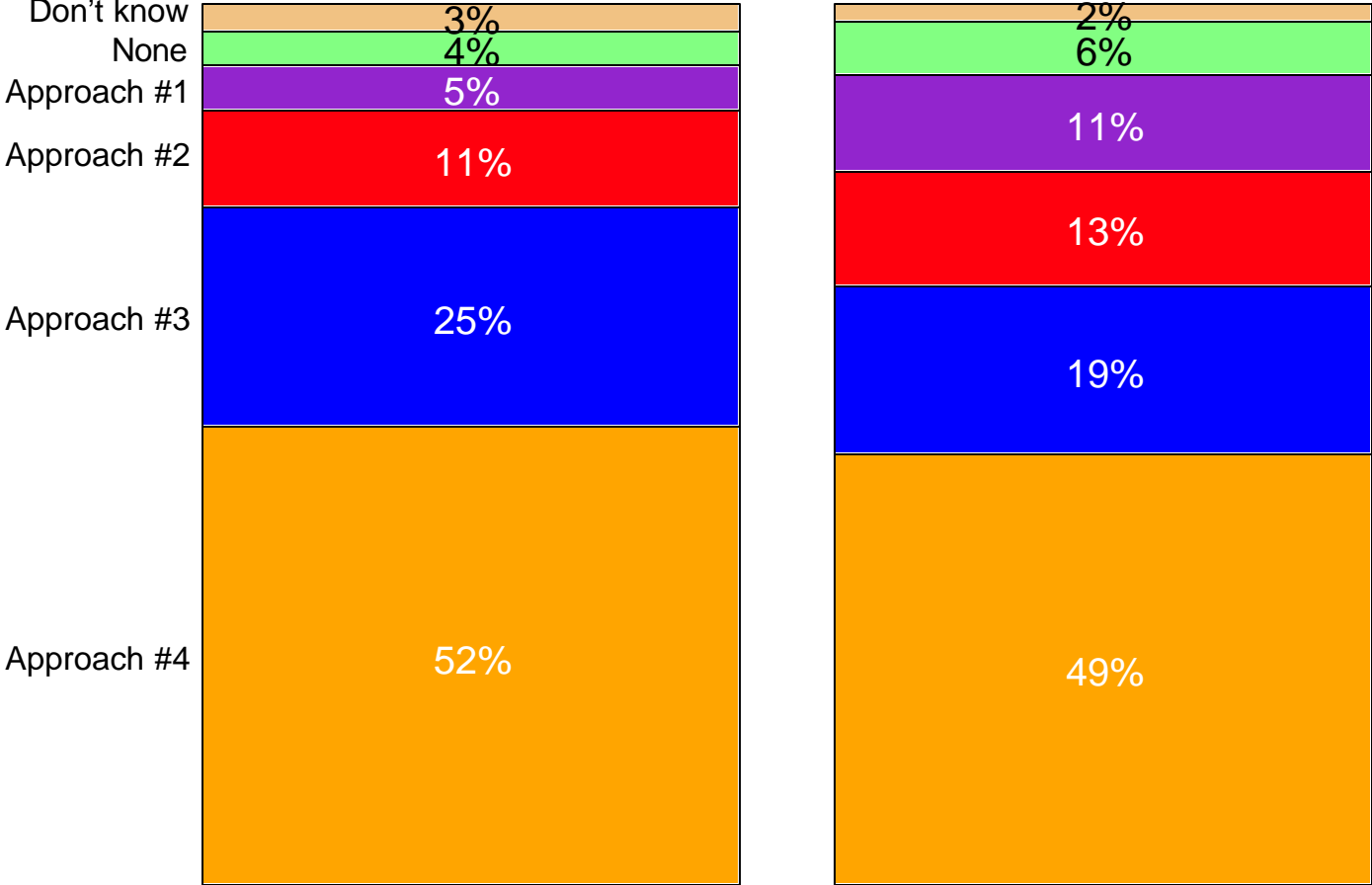
ANALYSIS OF FINDINGS

Level of Support for/Opposition to Each Approach



Total City residents base = 478
 Hastings Sunrise residents base = 167

Preferred Approach



Total
(n=478)

Hastings
Sunrise
(n=167)

Reasons For Preferring Approach

Approach #1

Base	34*
	<u>%</u>
It has the greatest amount of/more green space	43
It gets rid of Playland	29
It reduces the PNE to 10 days	17

Approach #2

Base	55
	<u>%</u>
Commercial and community use/Arts & Crafts/Studios/Cafes	37
It has the greatest amount of/more green space	36
It gets rid of Playland	24
It is the least expensive to build/Lowest capital costs	15

* Caution: Small base size

Reasons For Preferring Approach

Approach #3

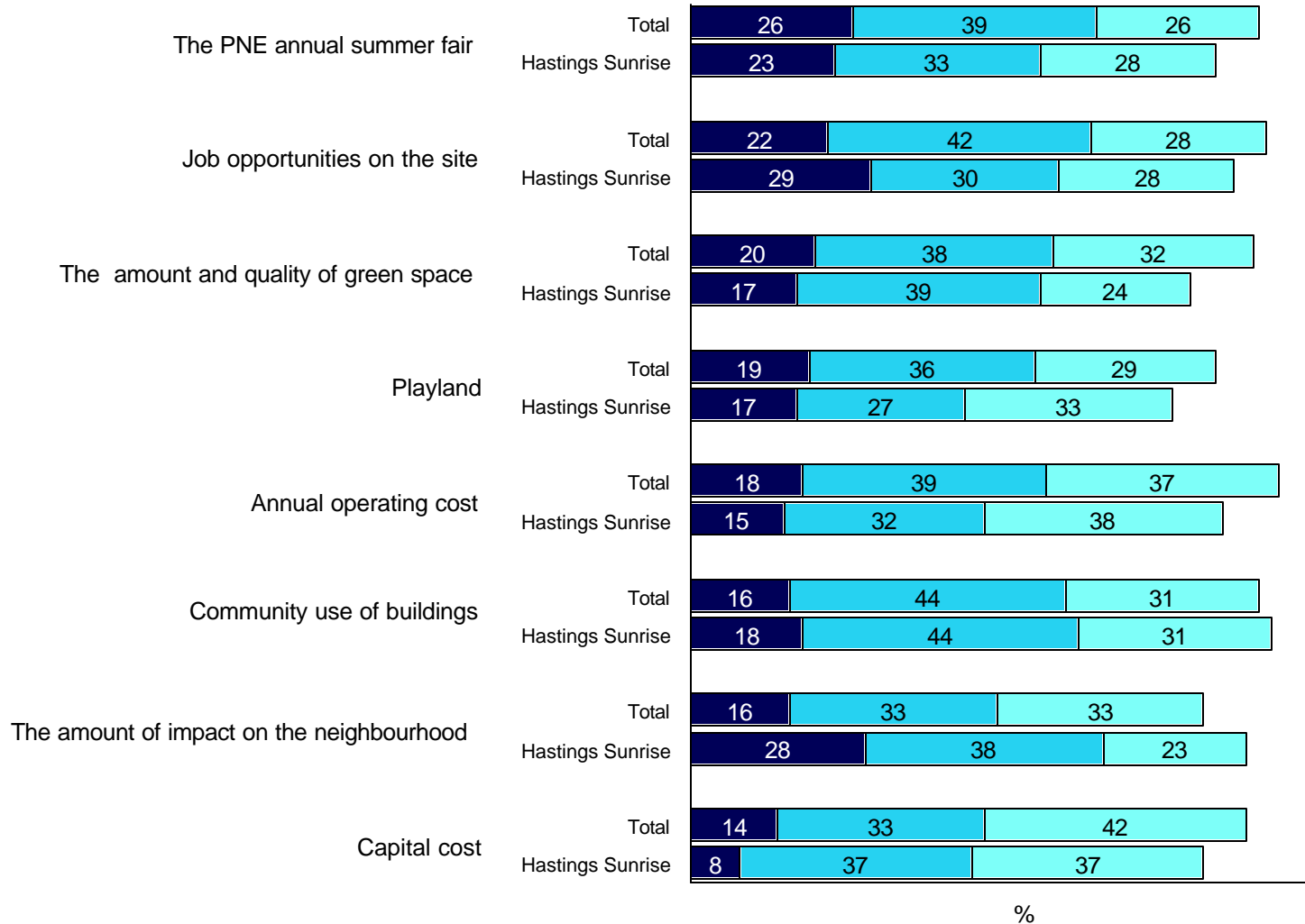
Base	110
	<u>%</u>
It keeps Playland	60
It keeps the PNE 17-days	32
It has the greatest amount of/more green space	22
It offers the most jobs	21
It is the least expensive to build/lower capital costs	19
It can operate without additional tax support/makes a profit	17

Approach # 4

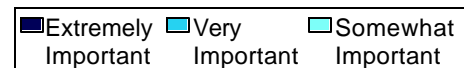
Base	245
	<u>%</u>
It keeps Playland	50
It keeps the PNE 17-days	43
It can operate without additional tax support/makes a profit	40
It offers the most jobs	38
More visitors/capacity/attractions	17
It has the greatest amount of/more green space	11
It has the most/more space for the PNE annual summer	10



Importance of Various Components of Each Approach



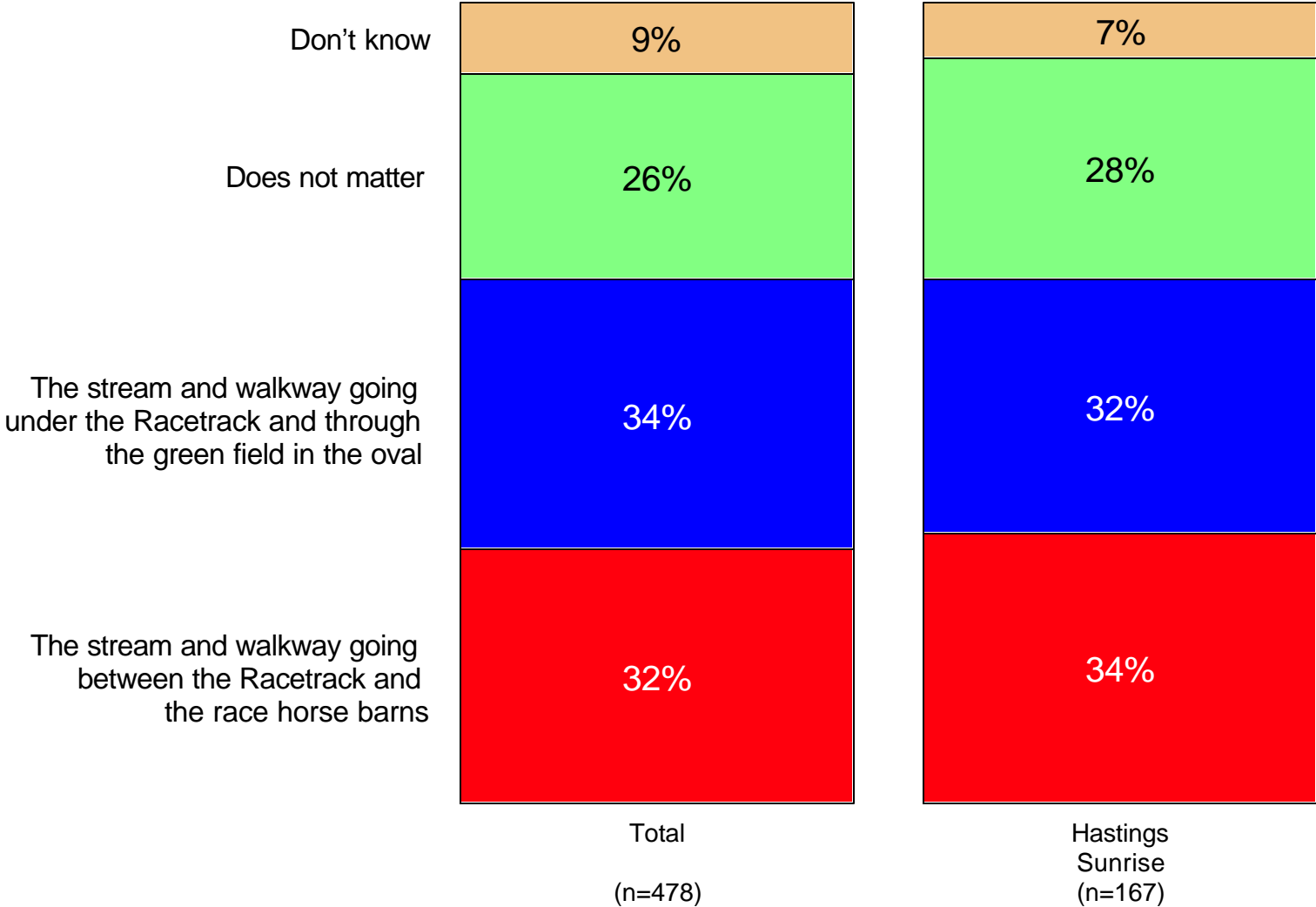
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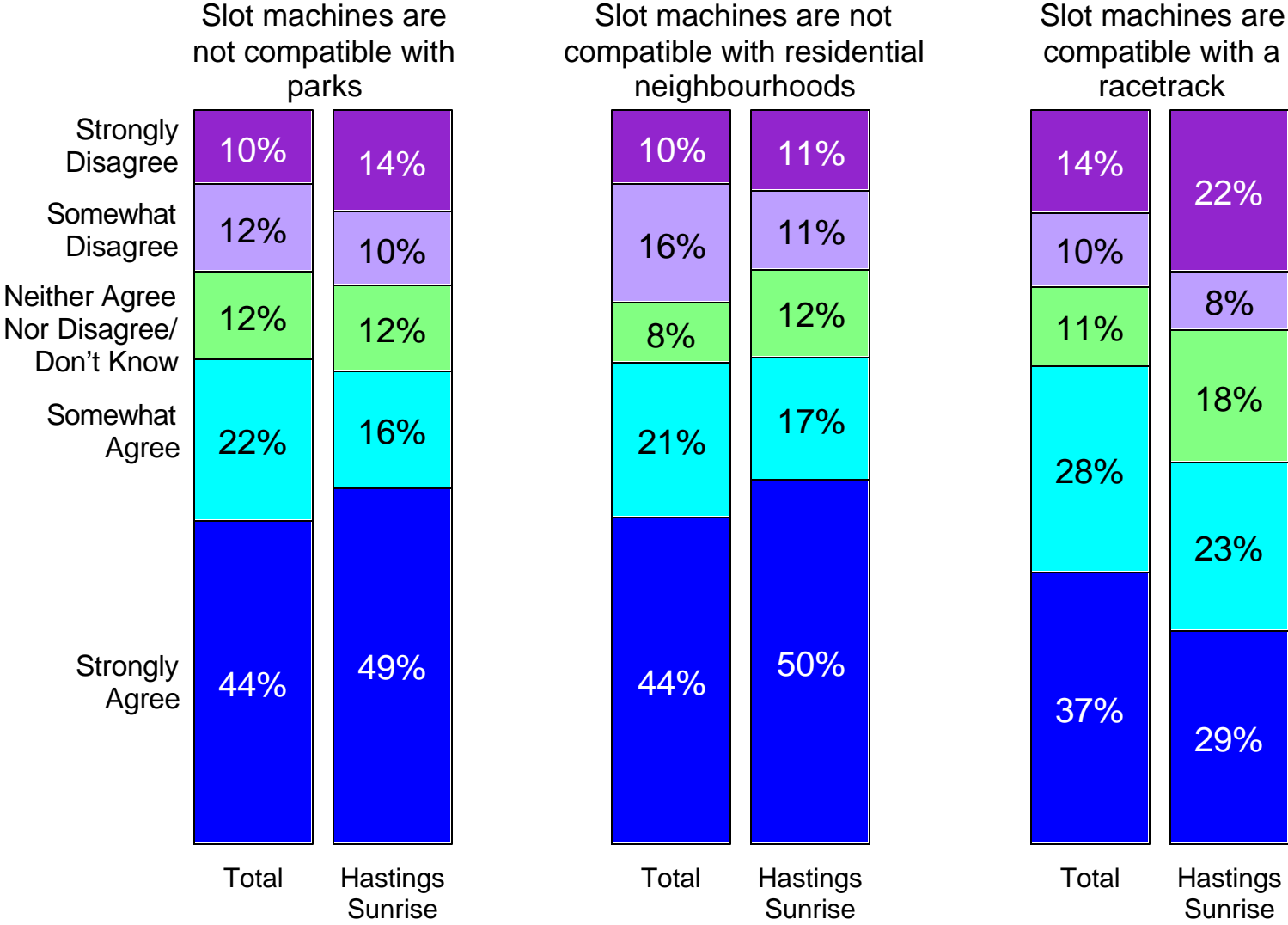
Q3.1-8



Preference for Stream/Walkway Location



Attitudes Towards Slot Machines

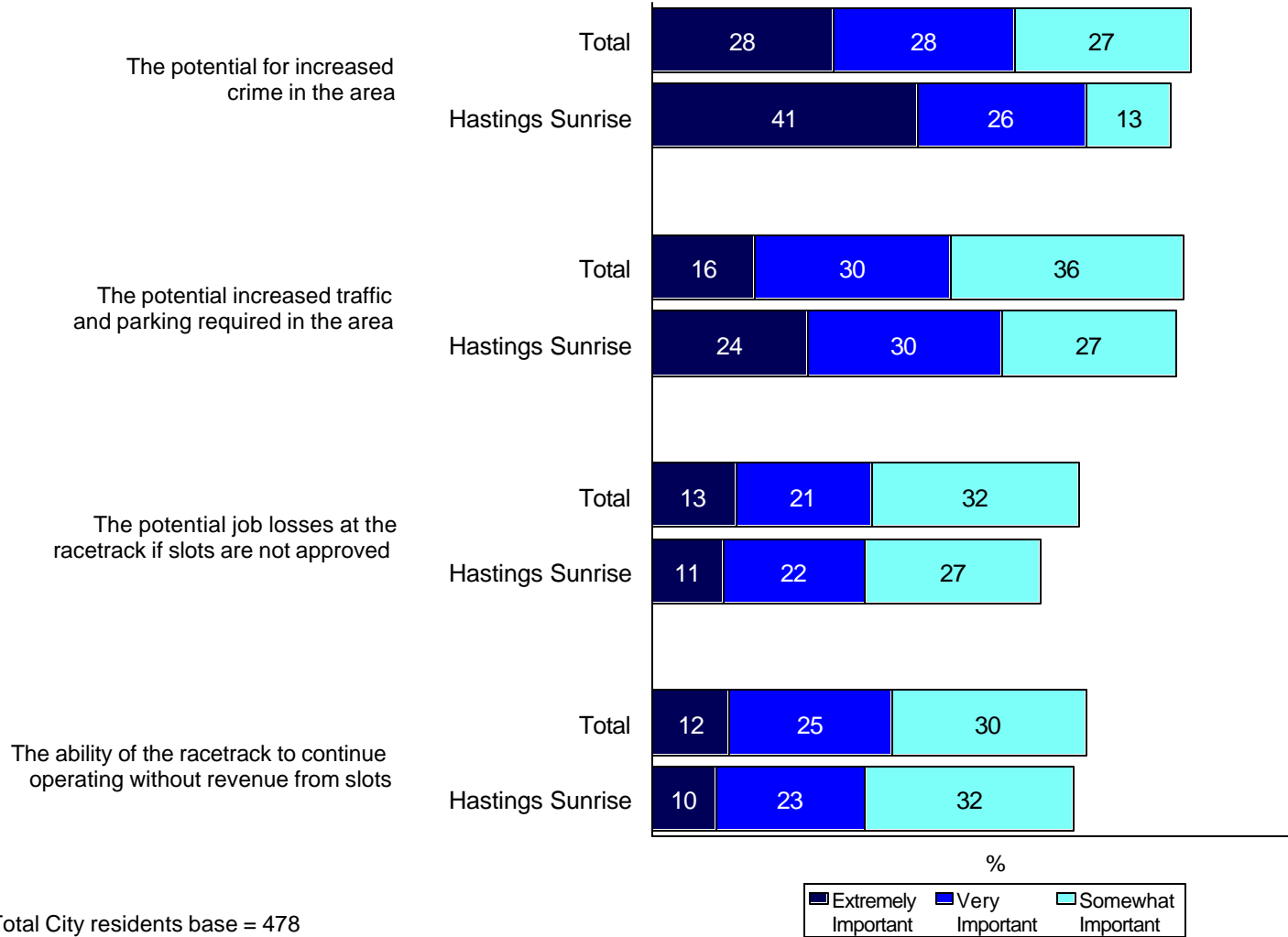


Total City residents base = 478
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Q5.1-3



Importance of Various Issues Associated with Slot Machines



Total City residents base = 478
 Hastings Sunrise residents base = 167

Q6.1-4



Hastings Park /PNE
Preliminary Capital Cost Estimates (\$2004)

Preliminary Costing of Hastings Park/PNE	2004\$	2004\$	2004\$	2004\$
	Approach 1	Approach 2	Approach 3	Approach 4
TOTAL EXCLUDING RACETRACK	\$79,550,400	\$69,494,400	\$119,824,750	\$136,872,000
TOTAL ALL COSTS				
a) Within Hastings Park (excluding parking lot improvements)	\$56,130,400	\$56,074,400	\$88,544,750	\$100,592,000
b) Parking Lot Improvements	\$10,990,000	\$990,000	\$18,850,000	\$23,850,000
c) Connections to Neighbourhoods	\$12,430,000	\$12,430,000	\$12,430,000	\$12,430,000
TOTAL EXCL. RACETRACK	\$79,550,400	\$69,494,400	\$119,824,750	\$136,872,000
d) Racetrack Improvements	\$25,000,000	\$25,000,000	\$20,039,000	\$20,039,000
TOTAL ALL COSTS	\$104,550,400	\$94,494,400	\$139,863,750	\$156,911,000
a) WITHIN HASTINGS PARK				
Landscaping				
Plantings, walkways, plazas, infrastructure, furniture, signage excl. Playland area	\$34,912,000	\$36,112,000	\$30,256,000	\$30,256,000
Subtotal	\$34,912,000	\$36,112,000	\$30,256,000	\$30,256,000
Buildings				
Adaptive reuse (Garden, Forum, Rollerland, Agrodome & Coliseum)	\$9,040,400	\$9,040,400	\$10,035,000	\$10,035,000
Convert Forum to Community Centre (net 2010)	\$0	\$0	\$5,500,000	\$7,500,000
Livestock Building	\$250,000	\$250,000	\$250,000	\$2,644,000
Subtotal	\$9,290,400	\$9,290,400	\$15,785,000	\$20,179,000
Playland				
Playland site infrastructure, landscaping, walkways, equipt, incl. moving rides	\$0	\$0	\$22,959,750	\$30,613,000
Playland service building	\$0	\$0	\$3,240,000	\$3,240,000
Subtotal	\$0	\$0	\$26,199,750	\$33,853,000
Conection to New Brighton Park				
Plantings, walkways, bridges/tunnels, infrastructure, signage	\$11,928,000	\$10,672,000	\$16,304,000	\$16,304,000
Subtotal	\$11,928,000	\$10,672,000	\$16,304,000	\$16,304,000
a) TOTAL WITHIN HASTINGS PARK	\$56,130,400	\$56,074,400	\$88,544,750	\$100,592,000
b) PARKING				
Improvements to existing parking	\$850,000	\$850,000	\$850,000	\$850,000
Adapt to accommodate temporary rides	\$140,000	\$140,000	\$0	\$0
Underground/Structured parking	\$10,000,000	\$0	\$18,000,000	\$23,000,000
b) TOTAL COST OF PARKING	\$10,990,000	\$990,000	\$18,850,000	\$23,850,000
c) CONNECTIONS TO RESIDENTIAL AREAS				
South under Hastings Street (incl. Hastings bridge)	\$6,730,000	\$6,730,000	\$6,730,000	\$6,730,000
East to Vancouver Heights (incl. Ped bridge)	\$4,000,000	\$4,000,000	\$4,000,000	\$4,000,000
Streetscape improvement to Hastings Street	\$700,000	\$700,000	\$700,000	\$700,000
Streetscape improvement to Renfrew Street	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000
c) TOTAL COST OF CONNECTIONS TO RESIDENTIAL AREAS	\$12,430,000	\$12,430,000	\$12,430,000	\$12,430,000
d) RACTRACK IMPROVEMENTS (excl Grandstand, Track & Oval)				
Relocating stables	\$25,000,000	\$25,000,000	\$0	\$0
Rebuilding shared stables	\$0	\$0	\$7,539,000	\$7,539,000
Rebuilding balance of stables	\$0	\$0	\$12,500,000	\$12,500,000
d) TOTAL COST OF RACETRACK IMPROVEMENTS	\$25,000,000	\$25,000,000	\$20,039,000	\$20,039,000

**Hastings Park /PNE
Preliminary Pro Forma Financial Summary (\$2004)**

Pro Forma Financial Summary - Hastings Park/PNE	2004\$	2004\$	2004\$	2004\$	2004\$	2004\$
(Source: ERA ND Lea reports)	Status Quo	Approach 1	Approach 2	Approach 3	Approach 4	Approach 4 (revised by City Staff)
Revenue						
Fair	\$ 21,585,336	\$ 1,298,000	\$ 3,314,000	\$ 22,911,000	\$ 27,629,000	\$ 26,629,000
Amusement Park	\$ 7,383,532	\$ -	\$ -	\$ 5,320,682	\$ 10,995,516	\$ 9,995,516
Year-round Operations	\$ 7,583,103	\$ 4,110,259	\$ 4,438,802	\$ 6,345,099	\$ 7,012,625	\$ 7,012,625
Subtotal - Revenue	\$ 36,551,971	\$ 5,408,259	\$ 7,752,802	\$ 34,576,781	\$ 45,637,141	\$ 43,637,141
Net Operating Surplus/(Deficit)						
Fair	\$ 7,170,807	\$ (402,423)	\$ 456,620	\$ 7,941,803	\$ 9,377,008	\$ 8,377,008
Amusement Park	\$ 2,216,116	\$ -	\$ -	\$ (89,506)	\$ 3,802,034	\$ 2,802,034
Year-round Operations	\$ 3,804,035	\$ 1,813,100	\$ 1,754,117	\$ 2,775,827	\$ 3,313,820	\$ 3,313,820
Subtotal - net Operating Surplus/(Deficit)	\$ 13,190,958	\$ 1,410,677	\$ 2,210,737	\$ 10,628,124	\$ 16,492,862	\$ 14,492,862
Site, Grounds & Admin Overhead						
Administration	\$ 7,303,055	\$ 2,121,257	\$ 2,443,789	\$ 7,411,166	\$ 8,349,683	\$ 8,349,683
Site Maintenance	\$ 1,451,934	\$ 1,282,085	\$ 1,282,084	\$ 1,946,943	\$ 2,246,943	\$ 2,246,943
Building Operations & Maintenance	\$ 1,281,080	\$ 1,178,091	\$ 1,185,839	\$ 1,257,838	\$ 1,286,101	\$ 1,286,101
Subtotal - Site, Grounds & Admin.	\$ 10,036,069	\$ 4,581,433	\$ 4,911,712	\$ 10,615,947	\$ 11,882,727	\$ 11,882,727
Subtotal Surplus/(Defict)	\$ 3,154,889	\$ (3,170,756)	\$ (2,700,975)	\$ 12,177	\$ 4,610,135	\$ 2,610,135
Plus Racetrack parking (excl. slot machines)	incl above	\$ 135,676	\$ 135,676	\$ 1,145,303	\$ 1,138,257	\$ 1,138,257
Net Surplus/(Defict)	\$ 3,154,889	\$ (3,035,080)	\$ (2,565,299)	\$ 1,157,480	\$ 5,748,392	\$ 3,748,392