

Item 10.3.2

Soccer Nova Scotia Fieldhouse Feasibility Study

FINAL REPORT | October 2024

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1. Introduction

1.1 Project Background & Purpose

Soccer Nova Scotia retained Sierra Planning and Management to undertake a needs assessment for a new full-size indoor turf facility within Halifax Regional Municipality.

Soccer Nova Scotia recognizes that program participation and demand for indoor bookings has been increasing over the past 3 years, and as a result has committed to building a new full-size indoor turf facility within the Halifax Regional Municipality (HRM).

The project aims to gain better understanding of demand for indoor soccer in HRM and surrounding region as a basis for effective planning for new facilities in HRM.

This report provides analysis of supply and demand for indoor soccer in HRM as a basis for effective planning for new facilities.

1.2 Project Scope

The project comprises six (6) stages including market and demand assessment, analysis of current operations and financial data, and identification of potential location sites.



1.3 About Soccer Nova Scotia

Established in 1912, Soccer Nova Scotia is a Provincial Sport Organization that promotes the game of soccer in the Province.

The organization oversees programs and initiatives throughout the Province and offers high-performance training programs, coach and referee education and certification programs.

Soccer Nova Scotia owns the BMO Soccer Centre - the Province's premier indoor soccer complex in Halifax.

Soccer Nova Scotia offers long-term player development pathway from grass-roots to soccer for life for players of all ages and different abilities. The pathway and its stages are shown on the following page.

Strategic Priorities

Soccer Nova Scotia's 2023 Strategic Plan DEVELOP directs the organization to grow the capacity for province-wide impact supporting player, coach, official, league and club development by supporting the growth of the game through top-quality facilities and infrastructure that enable the continued growth and development of soccer in Nova Scotia.



50+ Clubs

Over
26,000
Registered
Players

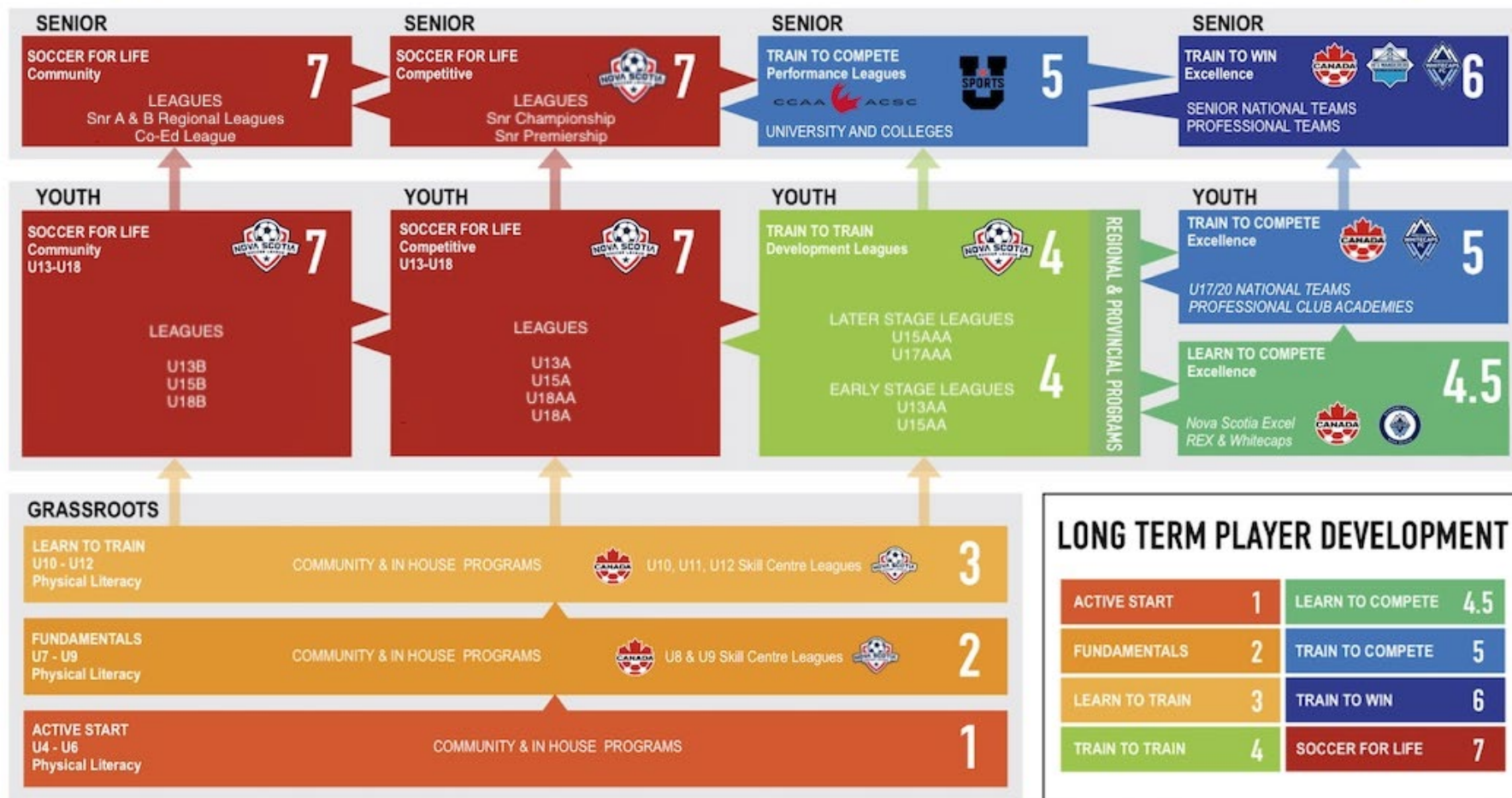
Volunteers,
Parents,
Supporters

2,500
Coaches

450 Match
Officials



SOCCER NOVA SCOTIA PLAYER PATHWAY



Source: Soccer Nova Scotia

1.4 Member Clubs

In 2023, Soccer Nova Scotia had 51 member clubs and 24,357 registered participants. The number of clubs decreased compared to 2016 (62 clubs), at the same time the number of participants increased from 22,845 in 2016 to 24,357 in 2023.

Three Soccer Nova Scotia Districts are located within HRM:

1. Halifax (HA), 2. Harbour East District (Dartmouth) (HE), and
3. Suburban (SU).

Over the 4-year period (2016-2023, excluding 2021), 53% of participants registered in all clubs were in HRM District. In 2023 alone, the share of registered participants within the HRM was 60% (13,447 registered participants).

The HRM region has two facilities: BMO Soccer Centre and East Coast Varsity Dome in Dartmouth.

As of 2023, the distribution of member clubs and indoor facilities in the other Soccer Nova Scotia districts was as follows:

- The Highland Region: 6 member clubs and The William M Sobey Complex in Stellarton;
- The South Shore Region: 6 member clubs and the HB Studio Complex;
- The Valley Region: 10 member clubs and the Credit Union Complex; and
- Cape Breton: 10 member clubs (CB is not included in the scope of this analysis).

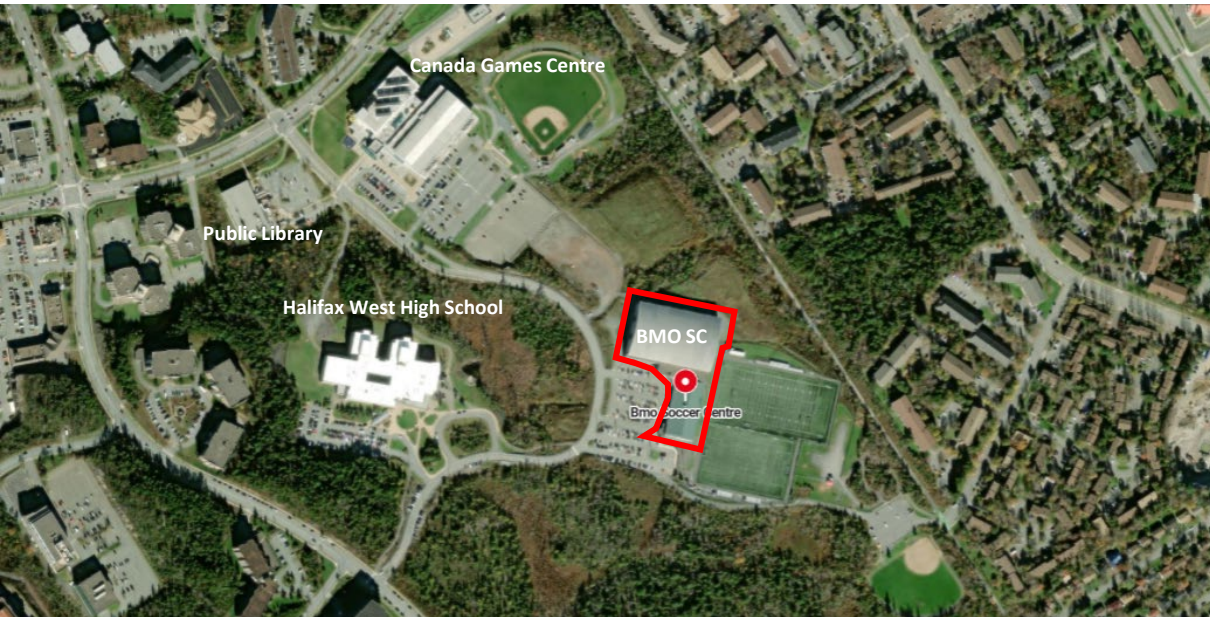
The following table shows the number of member clubs and registered participants by region in 2023, compared to an average over the 5 years in 2016-2023.

	Number of Clubs		Number of Reg. participants 2023	% of Total in 2023	Average Number of 2016-2023	% of Total Average
	2016	2023				
HALIFAX (HRM bounded by Lunenburg County South & Hants County West)	9	8	6,328	28%	5,196	24%
HARBOUR EAST (DARTMOUTH) (Halifax County Southeast of Hwy 118)	7	4	3,572	16%	3,224	15%
SUBURBAN DISTRICT ASSOCIATION (counties of Halifax and Hants)	6	4	3,547	16%	3,101	14%
CAPE BRETON (Cape Breton Island)	10	10	2,766	12%	2,188	10%
HIGHLAND (Cumberland, Colchester, Pictou, Guysborough & Antigonish)	6	6	2,218	10%	2,230	10%
SOUTH SHORE (Yarmouth, Shelburne, Queens, and Lunenburg)	6	6	1,268	6%	1,351	6%
SOUTH WEST (SWN / SS)	3	3	1,060	5%	1,024	5%
VALLEY (counties of Hants, Kings, Annapolis and Digby)	15	10	3,598	16%	3,787	17%
TOTAL	62	51	22,394	100%	22,100	100%

2. Current BMOSC Operations

2.1 BMO Soccer Centre Site Overview

The BMO Soccer Centre (BMOSC) is located south of the Canada Games Centre – a major hub for recreation within the City of Halifax - within Mainland Common Park. This park is also home to Halifax West High School and Keshen Goodman Public Library. The adjacent fields are owned by HRM.



View of the New BMO SC building



View of the Old BMOSC building

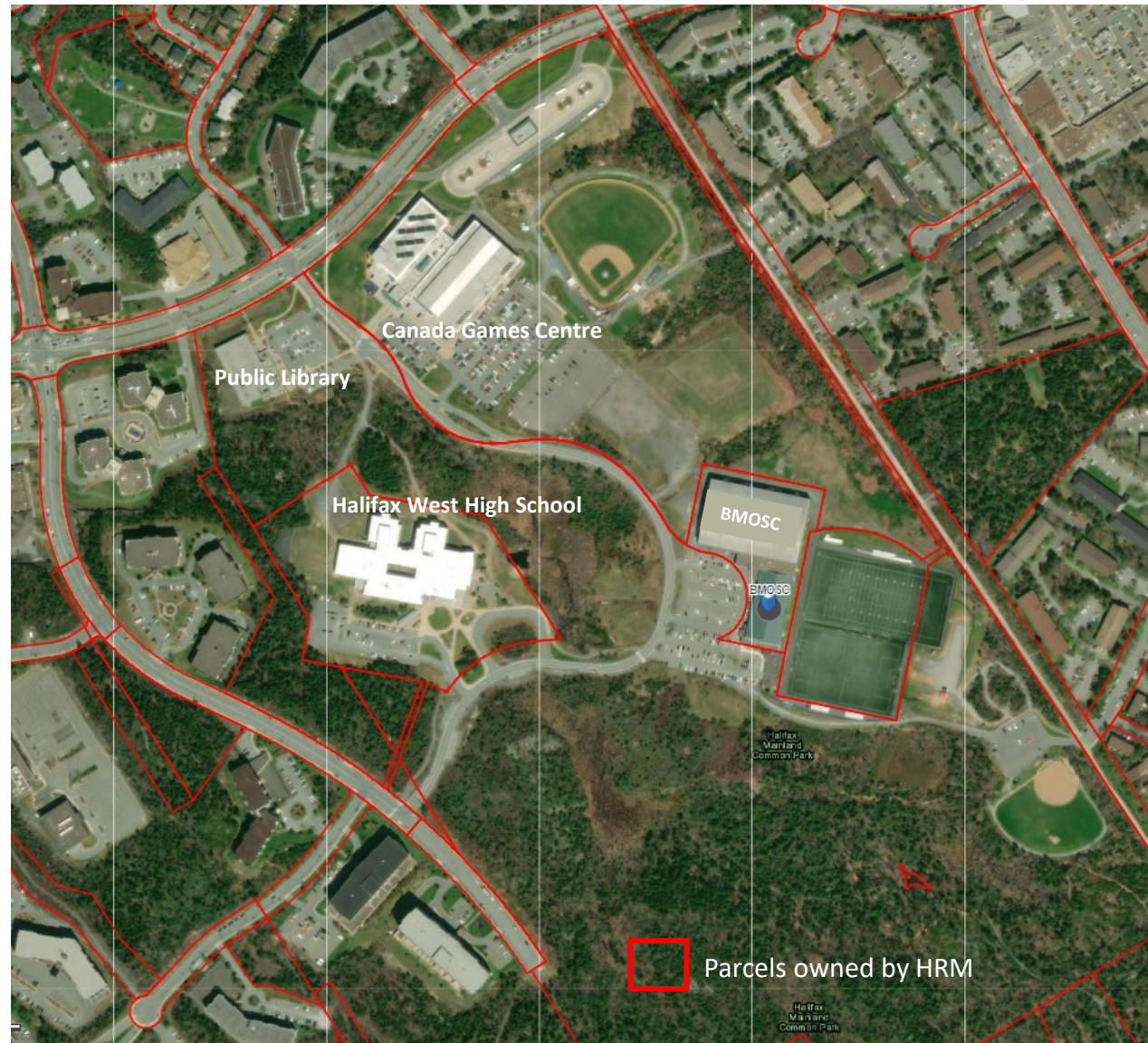


Soccer Nova Scotia leases the land from the HRM. The following map shows parcels owned by HRM and the BMOSC location. Adjacent parcels are HRM-owned and accommodate mostly sport and recreation uses.

A parcel to the East (immediately to the right of) the BMOSC comprises two grass fields.

To the North of the BMO building is the Canada Games Centre. The Canada Games Centre parking is located immediately to the North of the BMO SC building.

Similar (sport/recreation) uses may provide opportunities for Soccer NS to explore potential interest and partnerships in enhancing indoor turf / hard floor capacity of year-round- all weather sport opportunities.



2.2 About BMO Soccer Centre

The BMOSC is a year-round indoor multisport indoor facility featuring 4 indoor fields (details provided below), a boardroom (capacity: 50 (Theatre Style), 640 sq. ft.), a classroom/meeting room, and Kicks Café (capacity: 60).

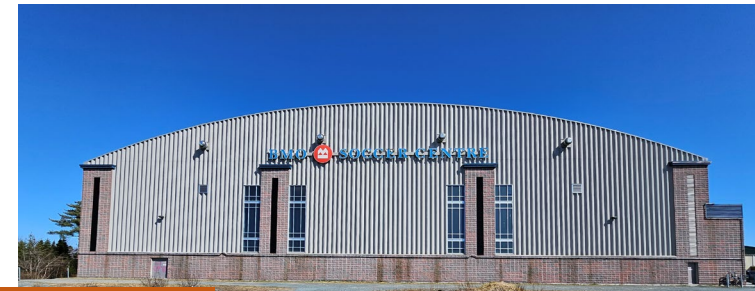
Since 2011, BMOSC has been providing opportunities to learn, train and play to clubs and leagues, athletes and residents, youth and adults, throughout the Province of Nova Scotia. The facility caters mostly to soccer groups but also to other sports including lacrosse, football, baseball, fitness.

BMO Soccer Centre (New Building – Fields 1, 2, 3):

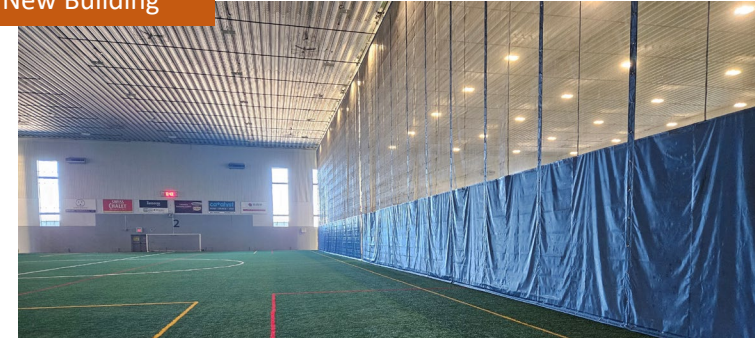
- Greenfields – Turf Vertex-CORE – 72,000 square feet (new turf installed in May 2023)
- Rubber – 120 ton
- Field Dimensions:
 - 3 Fields (100 x 200 feet)
 - Full Size (316 x 200 feet)
- Multiple Configurations
- Capacity – 300 (seated) and 100 (standing)
- Dressing Rooms 1, 2, 3, 6, 7, 8, 9 & 10 – 250 square feet
- Dressing Rooms 4, 5, 11 & 12 – 275 square feet

BMO Soccer Centre (Old Building – Field 4):

- Greenfields – Turf Vertex-CORE – 24,000 square feet (new turf installed in May 2023)
- Rubber – 40 ton
- Field Dimensions – 100 x 200 feet
- Multiple Configurations
- Capacity – 100 (seated) and 25 (standing)
- Dressing Rooms 1 & 2 – 250 square feet
- Dressing Rooms 3 & 4 – 270 square feet



New Building



Old Building



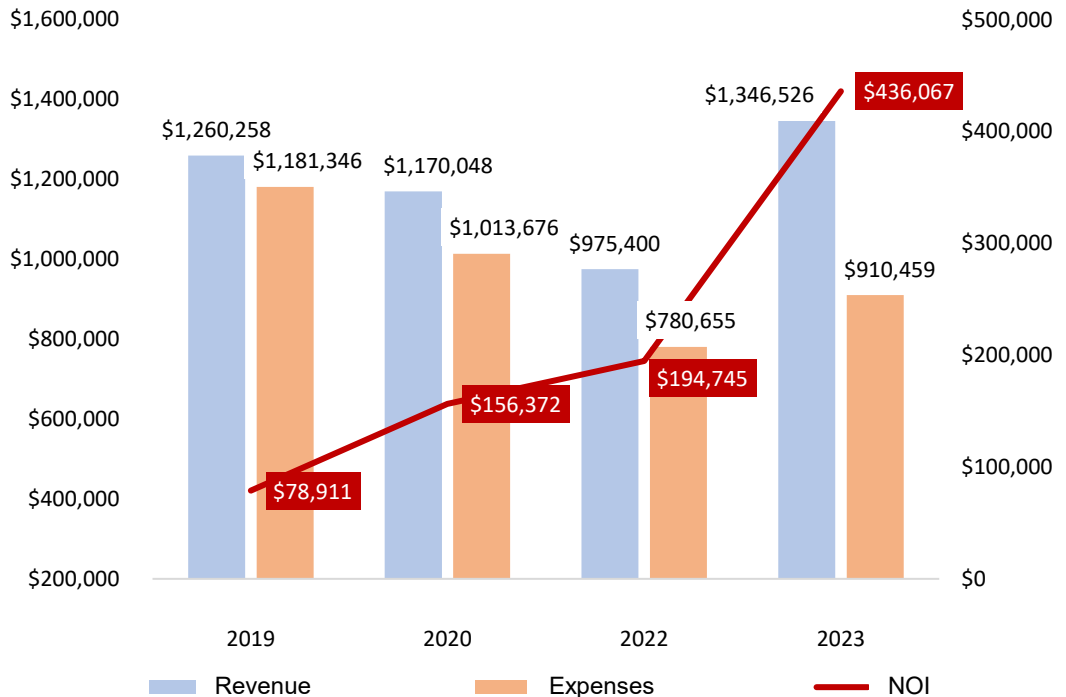
2.3 BMOSC Operating Financials

The adjacent table and chart summarizes the financial position of BMOSC from 2018/2019 to 2022/2023. The analysis excludes 2020/2021 due to impacts from the COVID-19 pandemic.

Profits have increased significantly since 2018/19 with profits in 2022/23 totaling over \$400,000, up from less than \$100,000 in 2018/19. This appears to be partly a result of a decrease in expenses over this period – largely due to the end of Newbridge lease of \$200,000 per year following sudden closure of the Newbridge Academy.

Over the four years, the facility has operated at an average net operating income (NOI) of just over \$216,000 on an annual basis.

BMOSC Revenues and Expenses 2018/19 to 2022/23
(excluded 2020/2021)



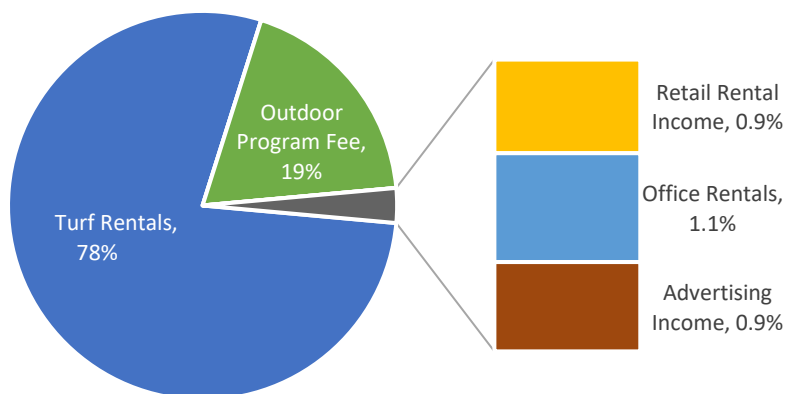
BMO SC NET OPERATING POSITION	2018/19	2019/20	2021/22	2022/23	4 Year Avg.
REVENUES	\$1,260,257	\$1,170,048	\$975,399	\$1,346,525	\$1,188,057
EXPENSES	\$1,181,346	\$1,013,676	\$780,654	\$910,458	\$971,534
NET OPERATING INCOME (NOI)	\$78,911	\$156,372	\$194,745	\$436,066	\$216,524

Data: Soccer NS, Soccer Nova Scotia Building P and L_ Rental Rates_ Revenue Overview

2.3 BMOSC Operating Financials

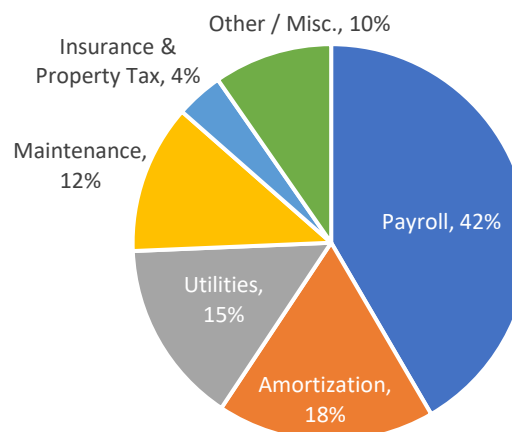
Revenues are largely comprised of turf rental income (78%, 95% of which comes from use by soccer groups) and outdoor program fees (19%). The remainder is made up of office rentals, advertising income, retail rental income, each accounting for approximately 1% of revenues, among other streams that produce minimal revenues.

BMOSC Revenues Breakdown, 2022/23



As it relates to expenses, there are a few categories that make up most of the expenses. This includes payroll expenses (indoor and outdoor combined) accounted for 42% of the total expenses, amortization of capital assets (18% in total), and utilities (electricity, water, oil and gas) which accounts for 15% of the total expenses in 2022/23.

BMOSC Expenses Breakdown, 2022/23



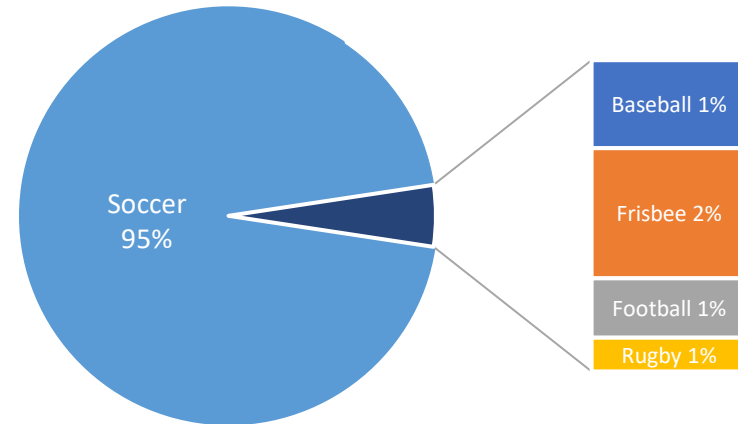
2.4 BMO SC Usage by User Group Sport

The following analysis uses booking data from 2022 and 2023 (2 full years since the closure of the Newbridge Academy) to provide a normalized picture of usage of the BMOSC.

The BMO SC is largely used by soccer groups – an average of 95% of total hours used are for soccer over the past four years (excluding 2021). The remaining 5% of hours booked comprise a variety of other sports such as ultimate frisbee (2%), baseball, football and rugby (1% each).

The percentage of hours used for soccer remained at 95-96% in 2022 and 2023.

BMO SC Usage Breakdown by User Group Sport in 2022/2023



BMOSC Usage Breakdown (hours booked) by Soccer and Other Sports

Sports / Users	Year End 2022		Year End 2023		2019-2023 AVG	
	Hours	%	Hours	%	Hours	%
Baseball	76	1%	136	1%	106	1%
Frisbee	171	2%	212	2%	192	2%
Football	105	1%	119	1%	112	1%
Rugby	36	0%	105	1%	71	1%
Soccer Reg.Online	2,235	22%	2063	15%	2,149	18%
Soccer	7,605	74%	11,004	81%	9,305	78%
Total	10,228	100%	13,639	100%	11,934	100%
Soccer %		96%		95%		95%

Data: Soccer NS, Soccer Nova Scotia Building P and L_ Rental Rates_ Revenue Overview

BMO SC Usage by Soccer User Groups: Member Clubs, Leagues, SNS and Other User Groups

The BMO SC facility is largely used by soccer member clubs (46%), leagues (35%) and SNS (19%) on average over 4 years (2019-2023, excluding 2021). 2021 has been excluded due to closure and usage impacts from the COVID-19 pandemic.

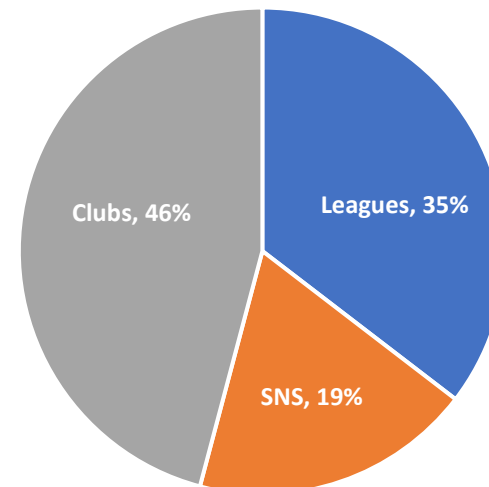
Similar distribution was observed in the other years (as shown in the adjacent exhibit).

The percentage of hours used by member clubs increased from 38% in 2019 to 52% in 2023. Average over 4 years was 46%

Over the same period, leagues' share of facility usage (hours) was 36% in 2019, 41% in 2022, and 34% in 2023. Average over 4 years was 35%.

SNS represented a higher share of utilized hours (26%) in 2019 compared to 2023 when the SNS share of hours decreased to 14%. Average over 4 years was 19%.

BMO SC Usage Soccer: Breakdown by Type of Use, 4 Year Average



	Year End 2019		2020		2022		2023		4-year Average	
Soccer:	Hours	%	Hours	%	Hours	%	Hours	%	Hours	%
Leagues	3,026	36%	2,724	30%	3,150	41%	3,030	34%	2,983	35%
SNS	2,179	26%	2,202	24%	828	11%	1,220	14%	1,607	19%
Clubs	3,193	38%	4,138	46%	3,623	48%	4,629	52%	3,896	46%
Total	8,398	100%	9,064	100%	7,601	100%	8,879	100%	8,486	100%

Data: Soccer NS, Soccer Nova Scotia Building P and L_ Rental Rates_ Revenue Overview

2.5 BMO SC Utilization by Season and by Field

BMO Soccer Centre operates 7 days 18 hours a day (6am to 12am). BMO Soccer offers four (4) fields.

The BMO SC Facility Allocation Policy applies prime time rates to rental time from November 1 to March 31 from 6am to 12am and non-prime-time rates are applied between April 1 to October 31.

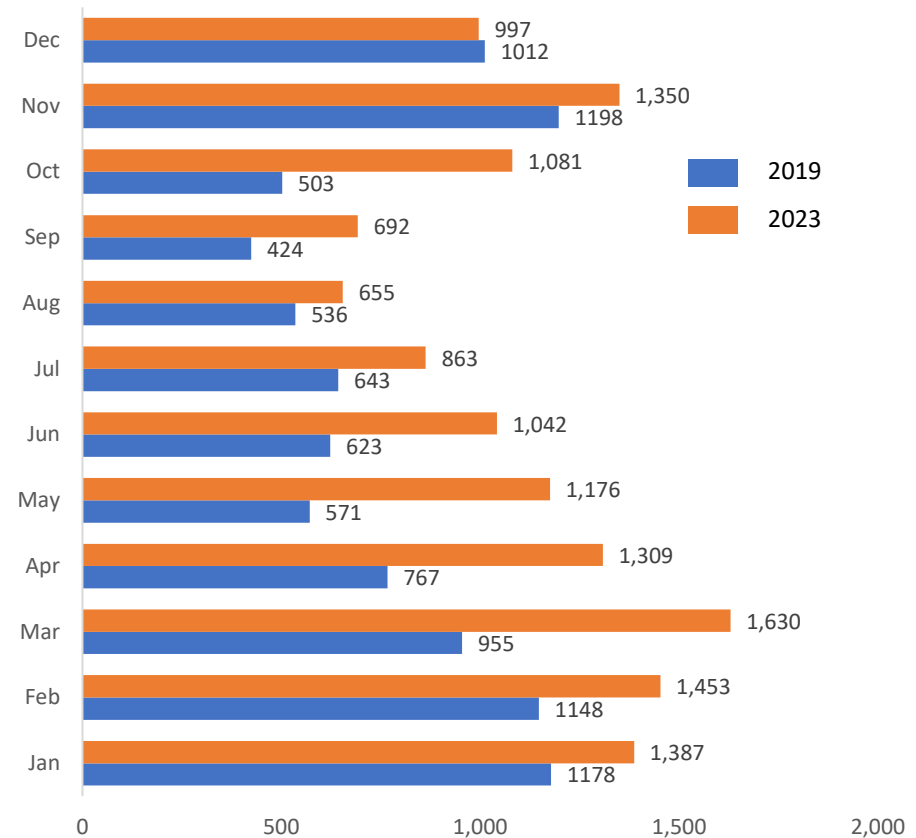
	2019 Hours	2023 Hours
BMO SC 4 Fields	9,555	13,362
Newbridge (Field 5)	10,015	
2019 Total Hours:	19,569	13,362

Until 2019 Soccer NS manages 5 fields, including one indoor field at the Newbridge Academy. The facility closed in 2019.

The following graph shows utilization of the BMO SC fields expressed as hours of BMO SC Fields and associated amenities in 2019 and 2023. The number of hours is higher in the fall-winter season and lower (but not significantly) in the spring-summer season.

	2019		2023	
	Hours	%	Hours	%
November 1 – March 31	5,489	57%	6,816	50%
April 1 – October 31	4,066	43%	6,816	50%
Total Hrs / Year	9,555	100%	13,632	100%

Utilization of BMO SC Fields by Month, 2019 and 2023
(Number of Hours Booked)



Data: Soccer NS, Bldg Revenue YE2019, Bldg Revenue YE2020, Bldg Revenue YE2022, Bldg Revenue YE2023

BMO SC Utilization by Month and by Field Based on Total Hours in 2023

Utilization is expressed as total booked hours as percentage of total hours the facility is available for booking.

Total availability: BMO SC is available for booking for 18 hours a day (6am to 12am). Reasonable use time, based on the historic booking data, is estimated as 16 hours a day. All 4 BMO SC fields are available 64 hours/day.

The resulting availability is 22,848 hours/year and soccer utilization is 12,619 hours are shown below for 2023 and on the following page for 2023. This analysis excludes BMO SC room bookings (5 hours).

In 2023, utilization of BMO SC fields range from average of 74% during prime-time months (January-February) to just over 30% on average in June-August.

As shown below utilization by field is distributed relatively evenly across the 4 fields, with field 4 used somewhat fewer hours compared to fields 1, 2 and 3.

Non-soccer participants represent additional 4% of total utilization or additional 1,013 hours. Non-soccer participation peaks in October (12%). While non-soccer participants use all fields, field 4 is booked more often compared to the other fields.

Utilization of BMO SC by Month and Field in 2023: BMO SC Availability Based on Total Available Hours

2023	Days in a Month	Hours available per day BMO SC Available / Month	Total Booked Hours - Soccer	Utilization – Booked Hrs as % of Available Hours	Number of Hours Booked by Field			
					BMOSC 1	BMOSC 2	BMOSC 3	BMOSC 4
Jan (excl. Jan 1)	30	1,920	1,352	70%	347	346	351	308
Feb	28	1,792	1,400	78%	355	356	373	316
Mar	31	1,984	1,505	76%	385	395	406	320
Apr	30	1,920	1,165	61%	327	317	330	192
May	31	1,984	997	50%	271	250	274	203
Jun	30	1,920	1,028	54%	278	262	272	217
Jul	31	1,984	832	42%	219	222	239	154
Aug	31	1,984	604	30%	135	145	170	155
Sep	30	1,920	611	32%	177	132	165	137
Oct	31	1,984	834	42%	210	199	215	211
Nov	30	1,920	1,320	69%	346	331	349	294
Dec (1-24)	24	1,536	974	63%	258	242	245	229
Hours Soccer			12,619	55%	3,305	3,195	3,387	2,733
Hours Non-Soccer			1,013	5%	212	168	179	455
Total Hours	357	22,848	13,632	60%	3,516	3,362	3,566	3,188

* Data Source: Soccer NS, Bldg Revenue YE2023

BMO SC Utilization by Month and by Field Based on Prime Time and High Season Hours in 2023

Based on total hours in 2023, soccer booked hours were 55% and non-soccer hours 5% of total hours the 4 fields are available. Table A summarizes utilization based on total hours.

A more nuanced estimate of utilization may be gleaned from utilization during prime-season and prime-time hours (Monday to Friday 4pm - midnight and weekends 6am – midnight).

Calculating utilization based on prime-time hours (16 hours Saturday and Sunday) reduces the number of hours facility is available for rent and consequently utilization rates increase to **66% by Soccer groups and 71% by all users** (as per adjacent exhibit – Table B).

Further, for the purposes of this analysis, **high-season prime time utilization** was estimated based on bookings between January 2 – March 31 on Saturdays and Sundays only.

Calculating utilization for prime time during high season further reduces the number of hours facility is available for rent and consequently utilization rates increase to **85% by Soccer groups and 88% by all users** (as per adjacent exhibit – Table C).

A

Utilization: Based on Total Hours in 2023

	# of Total Hours / All Users / All Months	Utilization
Available Hours (4 fields)	22,848	100%
Soccer Booked Hours	12,619	55%
Non-Soccer Booked Hours	1,013	5%
All Bookings	13,632	60%

B

Utilization: Prime Time Hours (Saturdays/Sundays) in 2023

	# of Prime Time Hours (Saturday/Sunday) / All User / All Months	Utilization
Available Hours (4 fields)	6,800	100%
Soccer Booked Hours	4,478	66%
Non-Soccer Booked Hours	325	7%
All Bookings	4,802	71%

C

Utilization: Prime Time Hours (Saturdays/Sundays) / High Season (Jan2 - Mar31)

	# of Prime Time Hours during High Season	Utilization
Available Hours (4 fields)	1,768	100%
Soccer Booked Hours	1,503	85%
Non-Soccer Booked Hours	52	3%
All Bookings	1,555	88%

3. Situational Analysis

3.1 Existing Supply of Indoor Turf Facilities

There are seven (7) existing indoor turf facilities in the HRM and surrounding area, as shown on the adjacent map.

Two (2) facilities are located within HRM - BMO SC in Halifax and East Coast Varsity Dome in Dartmouth.

Indoor turf facilities approximately within 1 hour drive from BMO SC are the West Hants Sports Complex in Windsor and East Hants Sports Complex in Lantz.

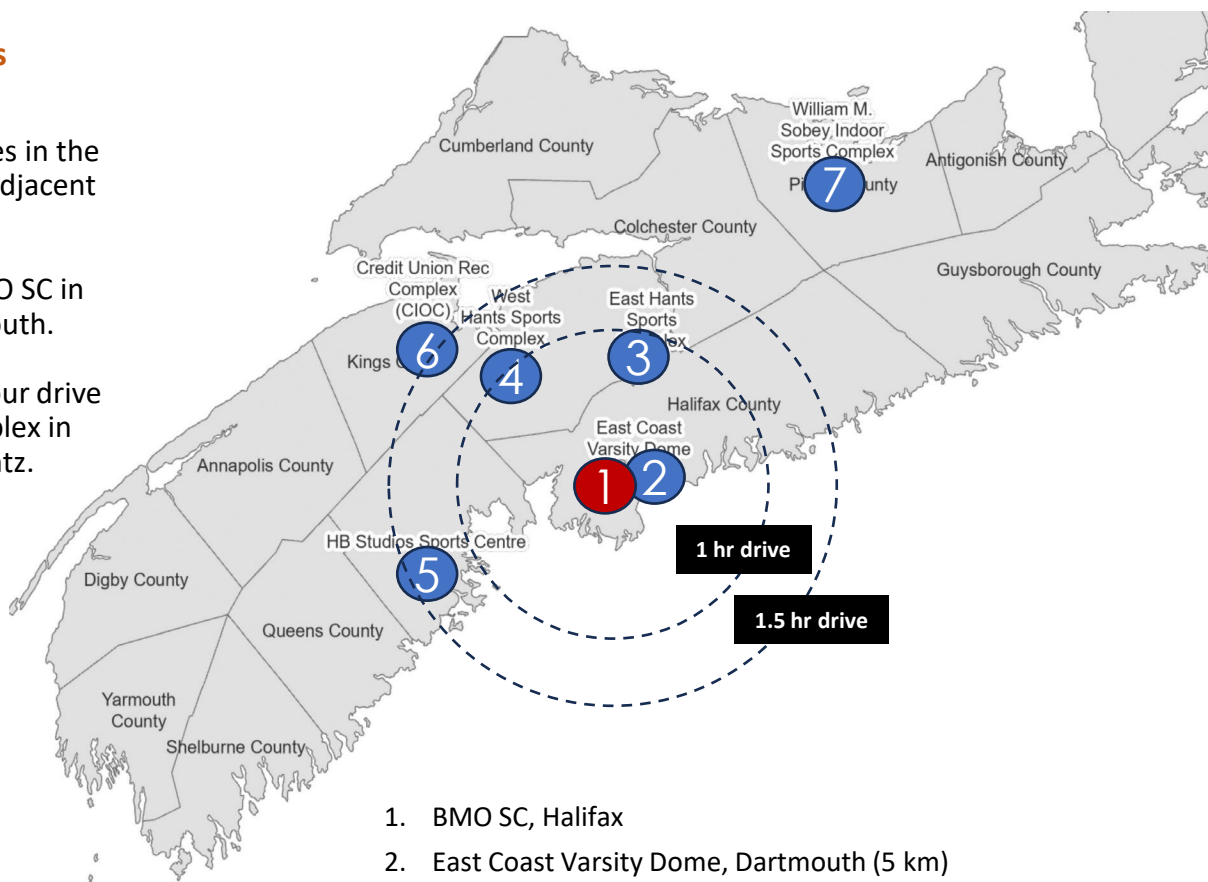
The HB Studios Sport Centre in Bridgewater and Credit Union Recreation Complex in Kentville are within 1.5-hour drive from BMO SC.

The Stellarton Complex (William M Sobey) is located within the Soccer NS Highland Region.

HB Studios Sports Complex in Bridgewater is located within the South Shore Region.

The Credit Union Recreation Complex located in Kentville serves the Valley Region.

Details of each facility, including amenities offered, are provided on the following page.



1. BMO SC, Halifax
2. East Coast Varsity Dome, Dartmouth (5 km)
3. East Hants Sports Complex, Lantz (50 km)
4. West Hants Sports Complex, Windsor (70 km)
5. HB Studios Sports Centre, Bridgewater (110 km)
6. Credit Union Rec Complex (CIOC), Kentville (110 km)
7. William M. Sobey Indoor Sports Complex, Stellarton (160 km)

Existing Supply of Indoor Turf Facilities

	Facility Name	Municipality	Description/Facility Specifications
1	Credit Union Rec Complex (CIOC)	Kentville	- Managed by the Valley United Soccer Club - the largest senior soccer league in the province represented by 44 teams from age 30 to 65. - Male and female programs; soccer players in all age groups.
2	William M. Sobey Indoor Sports Complex	Stellarton	- Managed by the Highland District Soccer Association. - Full Turf Field (210ft x 110 ft - Sept- April). - Summer Season Turf Field is available by request for multiple hours per day booking.
3	West Hants Sports Complex	Windsor, West Hants Regional Municipality	- Opened in 2020. - Owned and operated by the West Hants Regional. - Seven aside 100 x 200 pitch, with GTR Momentum Plus Turf. - Four dressing rooms, officials room. - The field house can be used for a variety of sports such as soccer, football, rugby, lawn bowling, ultimate frisbee, box lacrosse, etc. - Dedicated seating and standing areas. - Capacity to build a climbing wall within the field house.
4	East Hants Sports Complex	Lantz	- Full size indoor multipurpose sports dome, the largest in Atlantic Canada. - Multi-sport turf field (e.g. soccer, football, rugby, lawn bowling, ultimate frisbee, fast pitch, golf, etc.)
5	HB Studios Sports Centre	Bridgewater	Artificial grass sports field for soccer and other sports.
6	East Coast Varsity Dome	Dartmouth	- Founded by Brandon Moore and Chris Prentice in 2017. 60,000ft² (300' x 200') turf used as 3rds of 200' x 100' (20,000 sq./ft.) as well as full-field. - Lit weatherproof dome. - Rentals open year-round.
7	BMOSC	Halifax	(refer to Section 2 for details)

3.2 Demographic Change and Population Forecasting

Historic Population Growth

HRM and Nova Scotia have been growing faster than ever before since the introduction of the Federal Government's Atlantic Immigration Program in 2015 as well as a result of increased intra-provincial migration.

Between 2011 and 2021, HRM population increased by 13% to **439,819**, demonstrating higher growth rate compared to the Province. Over the same period, Nova Scotia population increased by 5% - reaching **969,383** residents.

Most recent population counts show that the current growth is out pacing the historic growth:

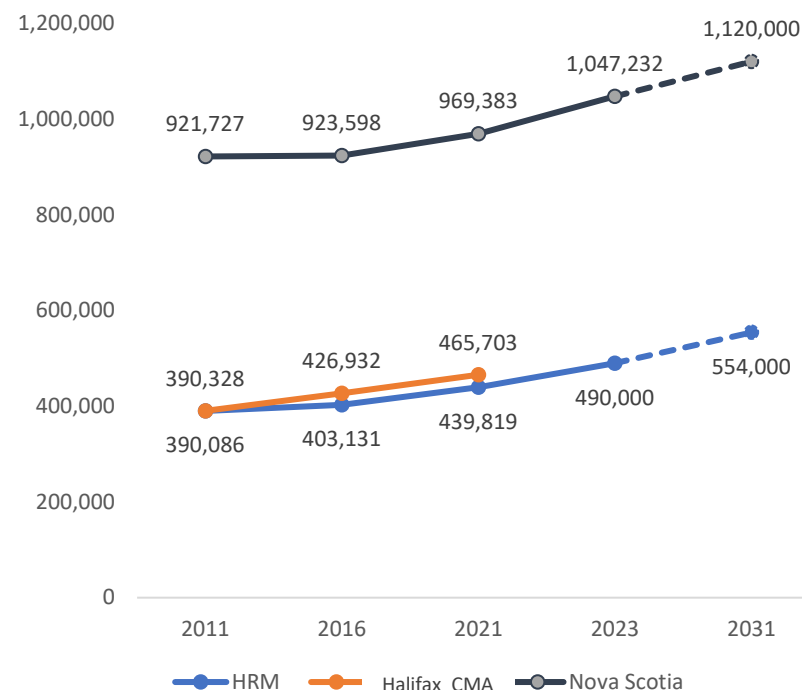
- HRM population was **480,582** as of July 1, 2022 (9% up from 2021), and
- Nova Scotia population was **1,047,232** as of April 1, 2023 (8% up from 2021).

Forecasted Growth

Both HRM and Nova Scotia are projected to continue growing. The 2023 draft of the Regional Municipal Planning Strategy projects that the population grows will continue and HRM is expected to have **554,000 residents by 2031 and 714,500 by 2050** (medium growth scenario).

The population of Nova Scotia is expected to be 1,120,000 (Statistics Canada Projections 2021-2046).

Population Historic and Projected: HRM & Nova Scotia



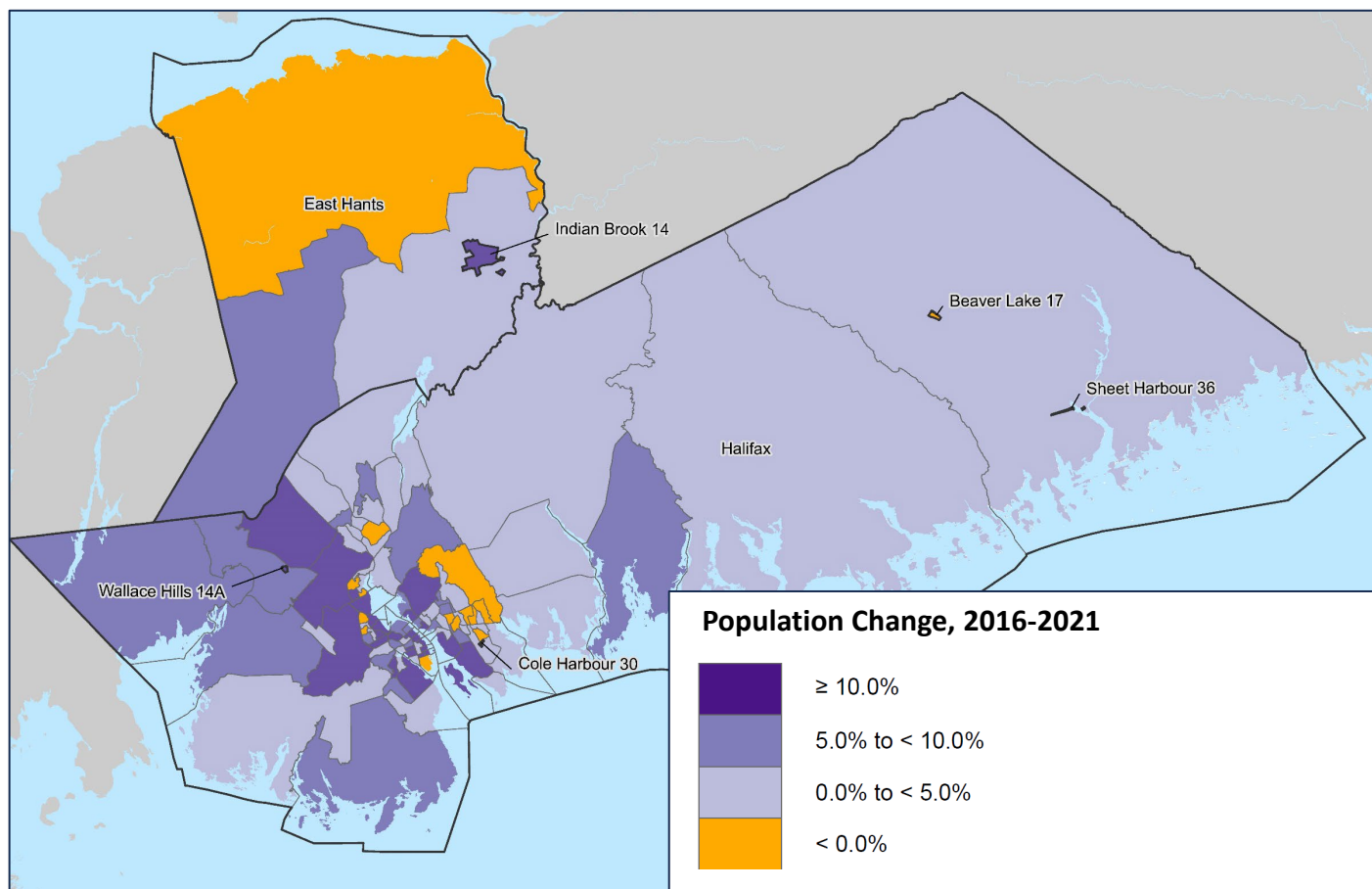
	2011	2016	2021	10 year change	5 year change
HRM	390,086	403,131	439,819	13%	9%
Halifax CMA	390,328	426,932	465,703	19%	9%
Nova Scotia	921,727	923,598	969,383	5%	5%

Historic Population Growth

The following map demonstrates that population growth between 2016 and 2021 was concentrated in the Halifax urban area and in the northeast of the Halifax CMA.

Population decreased in several central areas within the Halifax urban area. The change was less significant in the rest of HRM and Halifax CMA.

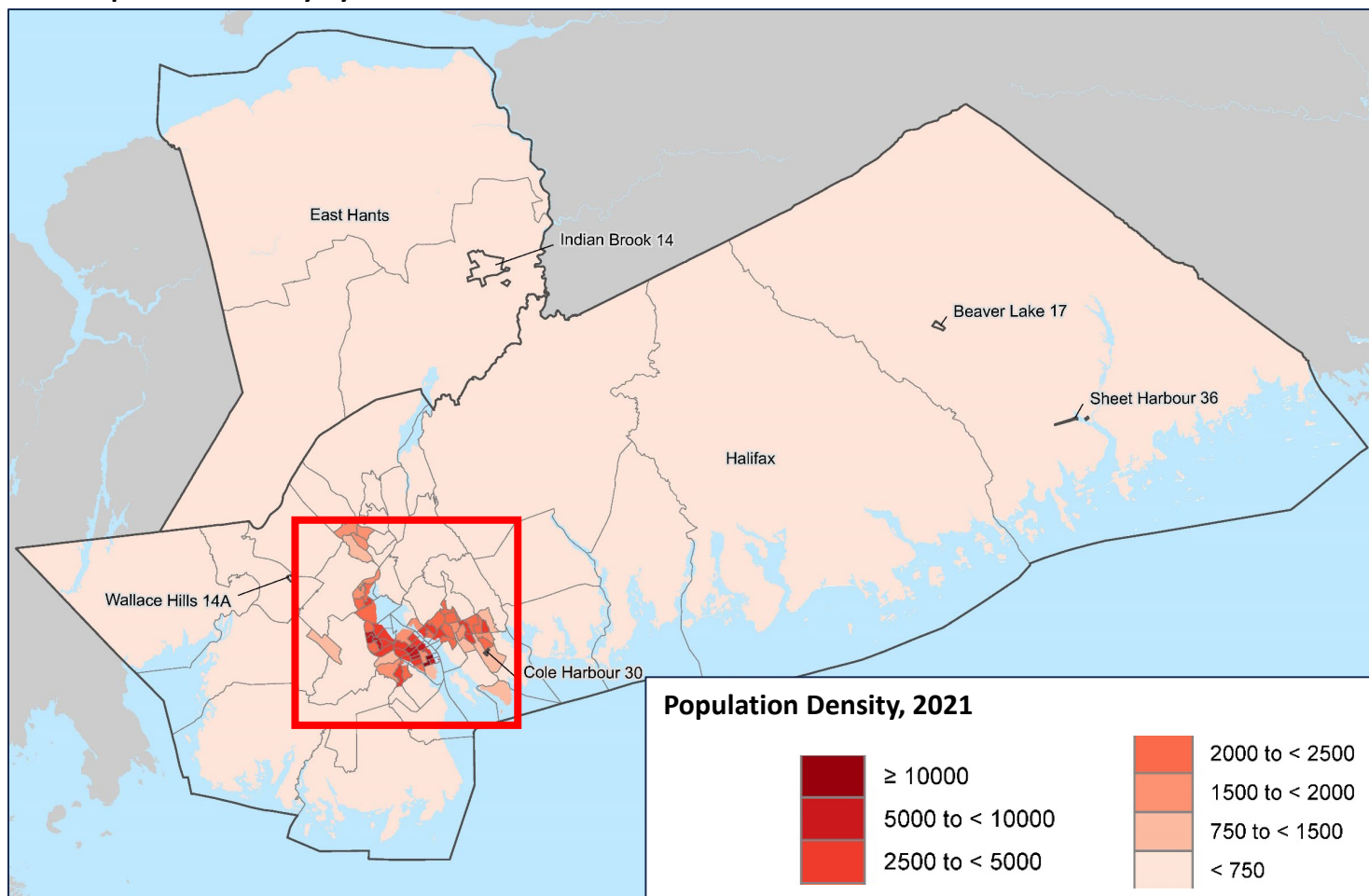
2016-2021 Population by Census Tract – Halifax CMA



Population Density

The following map demonstrates that population density (based on the 2021 census population) is higher in the Halifax urban area, compared to the rest of HRM and Halifax CMA.

2021 Population Density by Census Tract – Halifax CMA



Population Change by Age Group

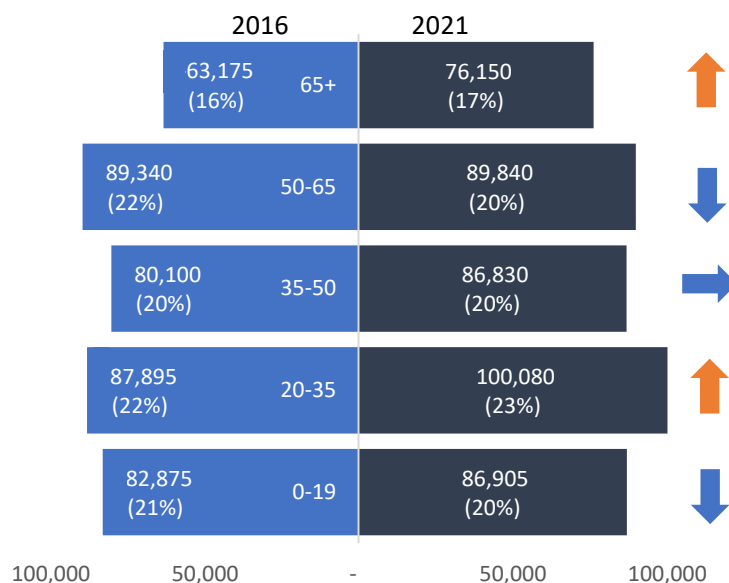
HRM population has a younger population profile compared to Nova Scotia. In 2021, the median age in HRM is 40.4 years, which is significantly younger than the province's median age of 45.6.

The 0-19 age cohort represents 21% of the total HRM population, which is higher than the province's 19%. Since 2016, this age cohort has decreased by 1% both in HRM and in Nova Scotia.

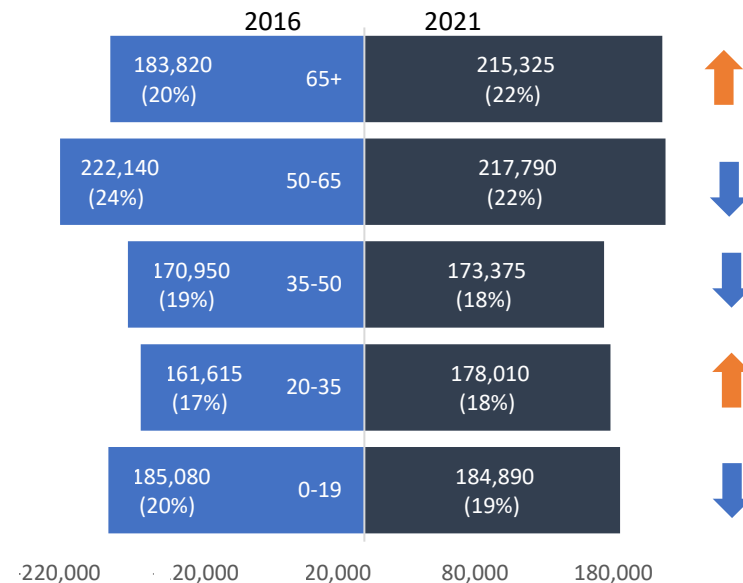
Age cohorts between 20 and 65 represent 63% of HRM population, compared to 58% in Nova Scotia. Since 2016, these age groups have decreased by 1 % in HRM and by 2% in NS.

Population 65+ years of age represents 17% of HRM population, compared to 22% in Nova Scotia. Since 2016, this age cohort has increased by 1% in HRM and by 2% in the province.

HRM Age Cohorts Change, 2016-2021



Nova Scotia Age Cohorts Change, 2016-2021

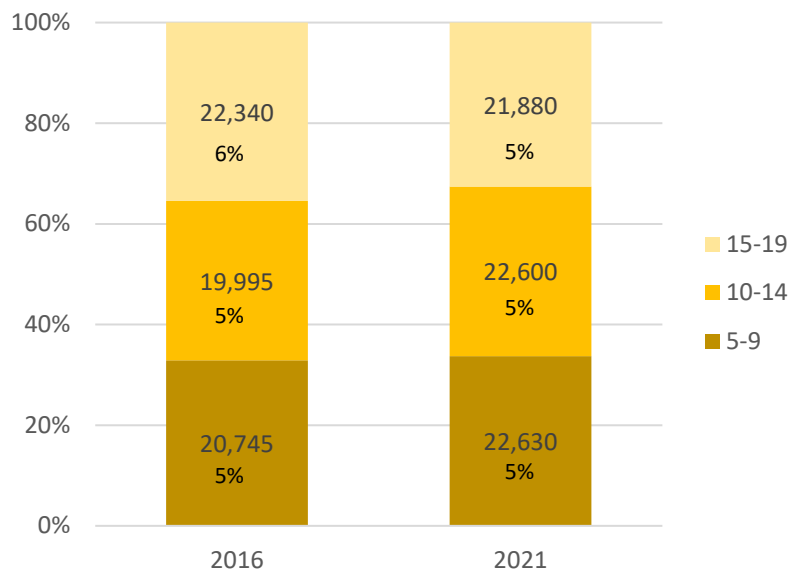


Population over 4 to under 19 years of age

HRM population in the age group over 4 to under 19 increased by 4% from 63,080 in 2016 to 67,110 in 2021. The fastest growing age groups are 10-14 (+13%) and 5-9 (+9%).

The 5-19 cohort share of total HRM population decreased from 16% in 2016 to 15% in 2021. Largely due to decreases in the 15-19 age cohort.

HRM Population 4-19 Years Old: Change 2016-2021 (Age Cohort as Percentage of Total Population)



HRM Population 4-19 years of age	5-year Change			Share of the Total Population	
	2016	2021	2016-2021	2016	2021
4-19	63,080	67,110	4%	16%	15%
15-19	22,340	21,880	-2%	6%	5%
10-14	19,995	22,600	13%	5%	5%
5-9	20,745	22,630	9%	5%	5%

3.3 Existing Demand

Member Clubs Participation Trends

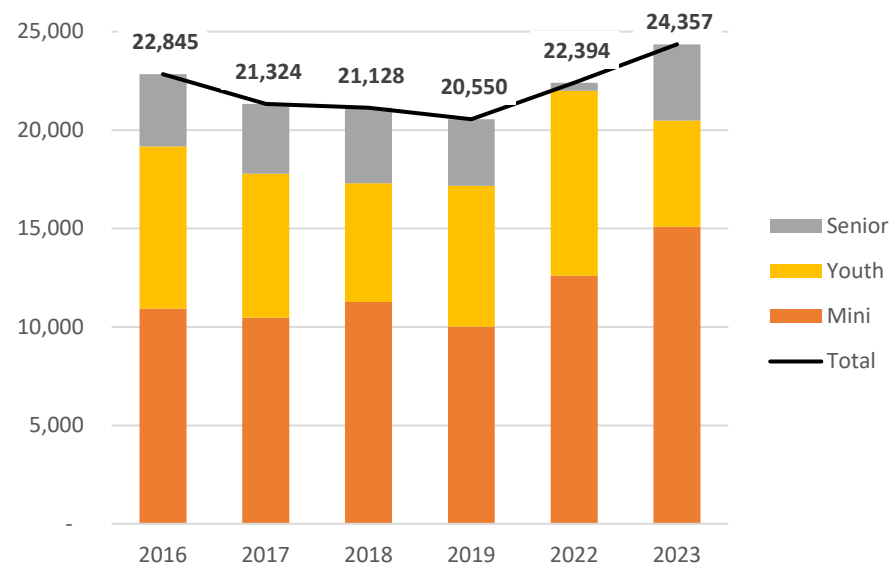
In 2023, Soccer Nova Scotia had over 50 member clubs (51) and 24,357 registered participants. The number of participants was higher than in previous years (as shown in the adjacent exhibit):

- Over the 6-year period (2016-2023, excluding 2021), average number of participants was 22,100. Year 2023 was more than 2,000 participants higher than the 4-year average.
- The highest previous year was 2016 - 22,845 registered participants. Over the 6-year period, the number of registered participants increased by over 1,500.

The majority of participants across all Soccer Nova Scotia member clubs are in Mini and Youth groups or 4 to under 19 years old. As the adjacent exhibit shows in 2016-2023 participants under 19 years of age have consistently represented over 80% of all players:

- Over the 6-year period, on average 86% (or over 19,000 players) were under 19 years of age and 16% were in senior age groups.
- In 2023, players under 19 years of age represented 84% (or over 20,000 participants) and senior players – 14%. Mini groups represented 62% and Youth – 22%.

Number of Registered Participants, 2016-2023
(excl. 2021)



	2016	2017	2018	2019	2022	2023	%, 2023	AVG	AVG %
Mini	10,932	10,463	11,273	10,008	12,600	15,079	62%	11,726	53%
Youth	8,228	7,322	6,028	7,157	9,399	5,411	22%	7,258	33%
Senior	3,685	3,539	3,827	3,385	395	3,867	16%	3,116	14%
Total	22,845	21,324	21,128	20,550	22,394	24,357	100%	22,100	100%

Other BMO SC User Groups include Leagues and other sports indicating a higher population and demand for facilities.

Historic Member Club Participation Rates in the HRM Area

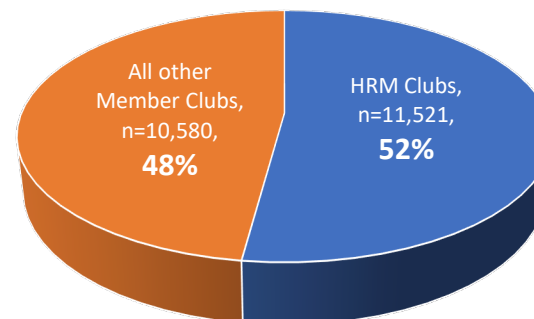
Three Soccer Nova Scotia Districts are located within HRM:

1. Halifax (HA), 2. Harbour East District (Dartmouth) (HE), and
3. Suburban (SU).

The table below shows participation rates in the three member clubs in the HRM Area. Over the 4-year period (2016-2023, excluding 2021), 53% of participants registered in all clubs were in HRM District. In 2023 alone, the share of registered participants within the HRM was 60% (13,447 registered participants).

The majority of participants (78%) are youth over 4 and under 19 years of age. The following section analyzes historic youth participation rates in the HRM area for the purpose of estimating the current level of provision of indoor turf facilities.

Membership of the HRM Soccer Clubs as Percent of Total Soccer NS Membership



	Number of Clubs		Number of Reg. participants	% of Total in 2023	Average Number of participants	% of Total Average
	2016	2023	2023		2016-2023	
HALIFAX (HRM bounded by Lunenburg County South & Hants County West)	9	8	6,328	28%	5,196	24%
HARBOUR EAST (DARTMOUTH) (Halifax County South East of Hwy 118)	7	4	3,572	16%	3,224	15%
SUBURBAN DISTRICT ASSOCIATION (counties of Halifax and Hants)	6	4	3,547	16%	3,101	14%
HRM Clubs Total & Share of HRM club members (as % of all members)	22	16	13,447	60%	11,521	52%
Number of Clubs and Members in all Soccer NS Clubs	84	67	22,394	100%	22,100	

Historic Youth Participation Rates in the HRM Area

The following assessment uses a compilation of registered youth participants from member clubs in the 3 relevant areas that comprise HRM Area – Halifax (HA), Halifax East (HE) and Suburban (SU).

For the purposes of analysis within this report 2016 is used as a baseline, as this year provides official population Census data from Statistics Canada and player data from Soccer Nova Scotia is considered to be a normalized state. While 2021 population Census data from Statistics Canada is available, the registered participation figures during that year were likely affected by COVID- related restrictions that were in place.

This analysis is focused on participants over 4 and under 19 years of age. As discussed above children and youth represent the largest share of registered participants (over 80%) across all Soccer Nova Scotia member clubs.

Across the HRM member clubs, this age group comprises 78% of total registered participants. In 2016, member clubs in HA, HE and SU had a total of 9,312 registered children and youth participants (age 4-19). This represents 14.8% of the population within the same age category.

For comparison, in 2023, member clubs in the HA, HE, SU Soccer Nova Scotia Regions had over 10,480 registered participants over 4 and under 19 years of age.

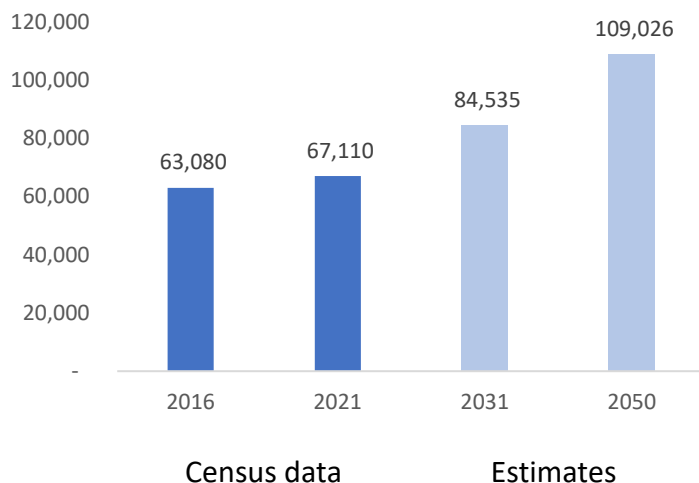
Regional Registered Participants (4 -19 years of age)

Registered participants	2016	2021	2022	2023
Mini	5,447	5,428	6,360	7,773
Youth	3,865	1,542	3,630	2,708
Registered participants 4-19	9,312	6,970	9,990	10,481

3.4 Projecting Future Demand

To understand the potential future demand for indoor turf facilities, it is assumed that the percentage of children and youth aged 4-19 (14.8% in 2016) that are registered participants remains consistent. Applying this percentage forward based on the projected population within the 4-19 age cohort would result in approximately 12,000 registered youth participants by 2031 and 16,000 by 2051.

HRM Age Cohort Change (4 -19 years of age)



3.5 Standard of Provision

There are four (4) indoor turf facilities within one hour drive time from the BMO Soccer Centre. As amenities in these facilities vary, the existing turf supply is calculated using field equivalents (as indicated below):

BMO SC	1.3 field equivalent
East Hants facility	1 field equivalent
West Hants facility	1/3 or 0.33 field equivalent
Dartmouth facility	1 field equivalent

Turf Supply Total 3.66 field equivalent

The current standard of provision is 1 turf field equivalent per 2,544 population 4-19 years of age. The standard is calculated by dividing number of registered participants 4-19 years of age by the current supply of turf fields (3.66 field equivalents).

Assuming no change in supply of indoor turf facilities the standard of provision is estimated to be decreasing to 1 per 3,279 participants 4-19 years old by 2031 and 1 per 4,372 by 2051 (as shown in the following table).

Regional Participation-Based Standard of Provision

	2016	2022	2023	2031	2051
Registered participants over 4 and under 19	9,312	9,990	10,481	12,000	16,000
Existing Indoor Turf Facilities (Field Equivalent)	3.66	3.66	3.66	3.66	3.66
Standard of Provision	2,544	2,730	2,864	3,279	4,372

Historic Seniors Participation in Soccer in the HRM Area

Senior participants are between the ages of 19 and 65. Between 2016 and 2024, Senior registered participants in the HRM Clubs on average 22% of total registered participants.

HRM Soccer Clubs: Number of Youth and Senior Registered Participants, 2016 - 2024

	2015	2016	2017	2018	2019	2023	2024
Mini / Youth	9,740	9,312	8,851	8,402	8,426	10,481	7,644
Seniors	2,705	2,610	2,523	2,734	2,507	2,966	2,942
TOTAL	12,445	11,922	11,374	11,136	10,933	13,447	12,610

HRM Soccer Clubs: Share of Youth and Senior Registered Participants, 2016 - 2024

	2015	2016	2017	2018	2019	2023	2024
Mini / Youth	78%	78%	78%	75%	77%	78%	61%
Seniors	22%	28%	29%	33%	30%	28%	38%

Historic Seniors Participation in Soccer in the HRM Area

Senior participants are between the ages of 19 and 65+. Between 2016 and 2024, Senior registered participants in the HRM Clubs on average 22% of total registered participants.

Senior registered participants age cohort represents 67% of the total population. Registered participants represent 1% of population between the ages of 19 and 65. These rates are used to project future senior soccer club members. Results are presented in the table below.

The current standard of provision is 1 indoor turf field per 3,257 registered participants. As the population grows, the current level of provision is estimated to decrease by decrease to 1 indoor field per 5,698 registered participants (as shown below).

Soccer: Regional Participation-Based Standard of Provision

	2016	2022	2023	2051
All Registered Soccer Participants	11,922	13,447	12,811	20,855
Existing Indoor Turf Facilities (Field Equivalent)	3.66	3.66	3.66	3.66
Standard of Provision	3,257	3,674	3,500	5,698

3.6 Reconciling Demand and Supply

The **projected HRM population (4-19)** increase will result in a **decreasing level of provision of indoor turf / gym facilities** if the supply of facilities (3.66 field equivalents) does not increase. This would ultimately result in **a deficit of 0.5 indoor turf fields in 2023, 1.1 fields by 2031 and 2.7 fields by 2051** to maintain the current 2016 level of supply of 1 facility per 2,500 registered participants 4-19 years of age (as shown in the adjacent Table A).

The estimate of deficit based on the need for registered youth participants should be considered as **a MINIMUM representation of need**.

Adding senior registered participants would result in **a deficit of 1.6 indoor turf fields in 2023, 2.5 fields by 2031 and 4.5 fields by 2051** to maintain the current 2016 level of supply of 1 facility per 2,500 registered participants (as shown in the adjacent Table B).

Additionally, based on the consultation (online survey and stakeholder interviews) non-soccer groups have over 1,100 members. This indicates even greater demand for indoor facilities, especially during high season.



Demand/Supply Reconciliation: Soccer Youth Registered Participants in HRM Clubs

	2016	2023	2031	2051
Registered participants 4-19	9,312	10,481	12,000	16,000
Observed Current Standard (based on 2016 participation)	1 per 2,500 registered participants (age 4-19 years old)			
Existing Indoor Turf	3.66	3.66	3.66	3.66
Future Needs	3.66	4.1	4.7	6.3
Surplus/Deficit	0.0	-0.5	-1.1	-2.7



Demand/Supply Reconciliation: Soccer All Registered Participants in HRM Clubs

Observed Standard and Demand - Youth & Seniors	2016	2023	2031	2051
Registered participants 4-19	9,312	10,481	12,000	16,000
Seniors 19+	2,610	2,966	3,765	4,855
Soccer Registered Participants (Mini, Youth, Seniors)	11,922	13,447	15,765	20,855
Observed Current Standard (based on 2016 participation)	2016 Standard: 1 per 2,500 registered participants			
Existing Indoor Turf	3.66	3.66	3.66	3.66
Future Needs	4.7	5.3	6.2	8.2
Surplus/Deficit	-1.0	-1.6	-2.5	-4.5

With respect to future needs, it is important to note the following:

- The above demand/supply reconciliation excludes the senior participants and demand from other sports beyond soccer.
- It assumes the ratio of youth playing soccer remains constant which is reasonable over the short term.
- It does not account for continued growth in indoor field house activities including soccer.
- Population is expected to grow and reach 714,500 (based on medium scenario in the Halifax 2021 Preliminary Population and Housing Projections).
- Accordingly, the number of registered participants is expected to increase.
- Adding senior soccer players and other groups would further increase demand and decrease the current observed level of service, indicating even higher need for a new facility.

4. Consultation

4.1 Consultation at a Glance

One of the core tasks as part of this assignment was to undertake a comprehensive consultation process. This was completed by way of a series of surveys to gather input on existing issues, and future opportunities from several stakeholder groups. Accordingly, three surveys were developed:

1. Soccer NS Member Clubs in HRM & Central Halifax Area.
2. Operators of Indoor Field Facilities. Six (6) indoor turf facilities discussed in the sections above were contacted with the survey.
3. Relevant Provincial Sport Organizations. Fifteen (15) PSOs that use indoor turf and/or gymnasium type facilities were identified and contacted with the survey.

The adjacent graphic demonstrates the scope of the consultation and the response rates. The following sections provide an overview of key findings focusing on key challenges and opportunities that a potential new indoor turf facility could provide. A Complete analysis of survey responses is provided in Appendix A.

Consultation Process at a Glance



**Survey 1 - Soccer NS
Member Clubs in HRM &
Central Halifax Area**

17 clubs out of



**Survey 2 - Operators of Indoor
Field Facilities**

3 of 6 Facility Operators



**Survey 3 - Relevant Provincial
Sport Organizations**

6 of 15 Select PSOs

4.2 Soccer NS Member Clubs Survey



**Survey 1 - Soccer NS
Member Clubs in HRM
& Central Halifax Area**

17 Member Clubs Responded

The member club survey was distributed to member clubs in HRM, Highland and South Shore Districts. Seventeen (17) member clubs provided a response.

When asked “Is the growth of your club constrained by the availability of indoor soccer facilities?”, 16 of the 17 respondent clubs said yes, it was.

The survey provided valuable feedback, which is provided in more detail in the Appendices. The existing constraints and potential opportunities are summarized as follows:

Constraints:

A shortage of space and turf/gym time was the most prevalent constraint. This impacts the clubs in the following ways:

- They cannot add new teams or people;
- They are unable to grow membership in winter months; and
- They require more training space to be able to offer more programming and provide player development opportunities.

Opportunities:

- More access to facilities equates to more members, resulting in growth of the game.
- Expansion of facility provision should be in line with the demand for these facilities.
- Clubs would like to see more competitive teams as well as more community programming/interest/ involvement (e.g. welcome nights for immigrant population).
- There needs to be a correlation between the cost and the value that members are receiving with limited access and time.
- Future benefits to improving player development, including added value to the organizations/clubs.

4.3 Provincial Sport Organizations Survey



Survey 2 – Relevant Provincial Sport Organizations

6 PSOs Responded

Of the 15 Provincial Sport Organizations (PSOs) that received the survey, 6 provided a response. This included responses from Basketball NS, Baseball NS, Squash NS, Football NS, Rugby NS, and Volleyball NS.

The key issues regarding access to / quality of indoor field house facilities is summarized below, with further details of responses provided in the Appendices.

PSO	Key Issues Identified
Basketball NS	There are not enough gyms.
Baseball NS	Limited access during peak training hours through the winter and spring.
Squash NS	Squash court availability, specifically multiple courts within the same facility.
Football NS	Size of the facility. Football NS would like to see an indoor facility with a full football field.
Rugby NS	Consistent difficulty in booking.
Volleyball NS	Not enough access to courts. This is an issue on weeknights and evenings.

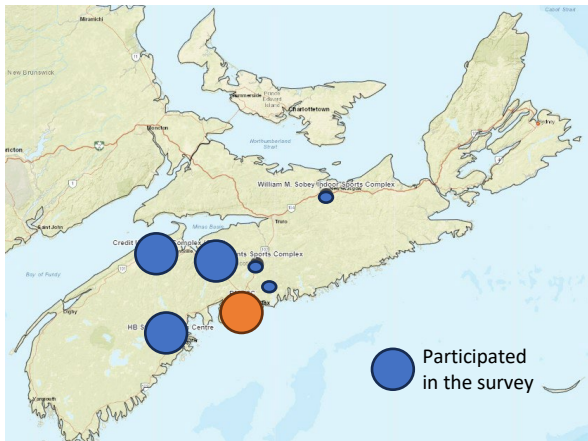
4.4 Indoor Facilities Operators Survey



**Survey 3 –
Indoor Field Facilities
Operators**

3 of 6 Facility Operators

The survey was distributed to operators of the six (6) other indoor sport facilities in the region. Three operators responded - Credit Union Recreation Centre, West Hants Sports Complex, and HB Studio Sports Centre.



Key highlights from the responses are provided below, with further details provided in the Appendices.

Changing Demand for Indoor Activities

	Credit Union Rec Centre - Soccer 70% of time	Demand slightly increasing	
	West Hants Sports Complex - Soccer 25% of time	Demand decreasing	
	HB Studios Sports Centre - Soccer 50% of time	Demand is not changing*	

*While HB Studios indicated no change in demand, they also mentioned a waitlist due to time conflict between soccer and other activities during week-nights

Booked time as percentage of total available time during peak hours:

	<u>Fall-Winter</u>	<u>Spring-Summer</u>
Credit Union Rec Centre	95%	14%
West Hants Sports Complex	75%	1%
HB Studios Sports Centre	75%	15%

4.5 Consultation Key Themes

There are several important outcomes that have emerged from the consultation undertaken as part of this assignment. This includes, but is not limited to:

- Demand is growing across all stakeholder groups surveyed. This includes Soccer NS member clubs, other Provincial Sport Organizations, and other facility operators.
- Soccer NS member clubs and several other sports report limitations in space and time availability.
- Greater availability of space and time would provide opportunities for the growth of clubs, teams, and community programming.
- Other indoor facilities are booked 75-95% of the time (in winter months).

Constraints

Facility Operators:
Demand for indoor
facilities growing

Member Clubs & PSOs:

Shortage of turf/
gym space & time

Opportunities

Member Clubs:
More access = more
members = Clubs' Growth
= growth of the game

Member Clubs & PSOs:

More Teams &
Community
Programming

PSOs:
Better access to indoor
facilities – gymnasium
type spaces, courts

Member Clubs & PSOs:

Modern facilities –
better amenities,
accessibility

4.6 Situation Analysis Key Takeaways

There are several important outcomes that have emerged from the analysis and consultation completed as part of this assignment. This includes, but is not limited to:

Supply & Current Level of Service:

- With 3.66 indoor turf facilities within the region, the current standard of provision is 1 indoor turf facility per 2,500 registered participants 4 to 19 years of age.

Demand:

- Children and youth (4-19 years of age) represent the largest share of registered participants (over 80%) across all Soccer NS member clubs. 4-19 population is projected to increase by 2031.
- Population distribution analysis demonstrates higher density and growth of population in the Halifax urban area.
- Consultation results support findings of population-based analysis of the current and future service levels and needs.
- Consultation results demonstrate that demand for indoor turf/gym facilities exists and is growing across all stakeholder groups surveyed including Soccer NS member clubs, other Provincial Sport Organizations, and other facility operators.
- The estimated **HRM population (4-19) increase** will result in a **decreasing level of provision of indoor turf / gym facilities**, if the supply of facilities (7) does not increase. This would ultimately **result in a deficit of 1.1 indoor turf field by 2031** based on the existing service level of 1 indoor field per 2,500 registered participants under 19 years of age and **2.7 fields by 2051. These estimates of deficit should be considered as a MINIMUM representation of need.**
- Further adding all registered soccer participants and applying the same standard, the report demonstrated the **existing deficit of 1.6 field as of 2023. By 2031 2.5 new indoor fields will be required to maintain the current level of service** of 1 indoor field per 2,500 registered participants.
- Additionally, based on the consultation (online survey and stakeholder interviews) non-soccer groups have over 1,100 members. This indicates even greater demand for indoor facilities, especially during high season.

5. Best Practice

5.1 Comparable Facilities Review

The focus of this review is to provide an indication of the form and function of indoor turf and gymnasium sports facilities across Canada.

The focus here is on fieldhouses as structures rather than air supported domes, as this represents the highest and best uses of the subject lands. Examples are provided below.

The review looks at the general scale and amenities provided within these types of facilities - this is the best way to understand the market opportunities.

Key observations can be summarized as follows:

- Most facilities include more than one major component, with many including artificial turf fields, gymnasiums space, and track and field facilities (or some combination of these).
- Facilities range significantly in size from over 60,000 sq. ft. to over 200,000 sq. ft. Of course, facility size is largely dependent on the types of components that are included.
- Larger facilities are often associated with a post-secondary institution and/or are legacy projects from national or international competitions.
- Structure types include air supported domes and pre-engineered steel structures.

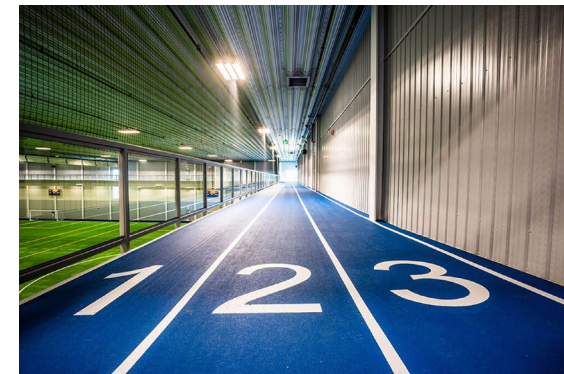
- Ownership and operations vary across the facilities, with many being municipally-operated – most of the examples provided below are municipal operation, private organizations, not-for-profit entities, or post-secondary institutions.

The following facilities were reviewed and are discussed in more detail next.

Facility / Location	Area Sq.Ft.	Cost / Sq. Ft. adjusted to 2023 (\$CAD)
Saguenay Soccer Arena, Saguenay QC (2022)	68,000	\$412
Paramount Sportsplex, Mississauga, ON (2007)	200,000	\$193
Commonwealth Fieldhouse, Edmonton, AB (2012)	90,000	\$788
Irving Fieldhouse, Saint John, NB (2019)	110,000	\$302
Sasktel Sports Centre - Operated by the Saskatoon Soccer Centre Inc. (N/A)	167,000	N/A
Proposed Facility: Soccer Northwest Ontario Fieldhouse, Thunder Bay, ON	110,000	\$427 (Estimate)
Honco Lévis Soccer Stadium, Charny, Québec, (2007)	66,100	\$404

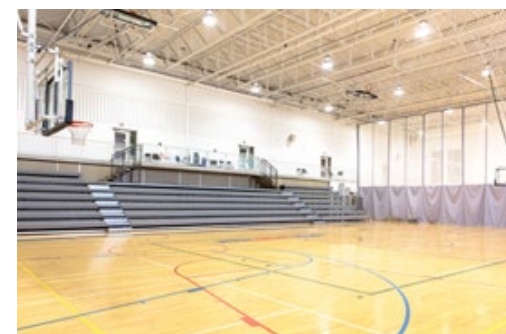
Saguenay Soccer Arena

Location	Saguenay, Quebec
Year Built	2021-2022 (Turnkey design-build)
Size (sq. ft.)	68,000 sq.ft., including - Main Pitch: 58,286 sq.ft. - Running Track: 9,300 sq.ft.
Amenities	• Synthetic turf • A system of curtain dividers to divide the main field into three playing surfaces • 13 change rooms located along the court to minimize travel distances • Running track • Glass-and-aluminum stairway to the upper floor • Administrative offices • Multi-sport complex: soccer, baseball, flag football, football, rugby, ultimate frisbee and spikeball • Dimensions: TC 62 m x 101 m x 12 m • Climate control: Steel roof reflecting heat through radiation (cooling and heating), ceiling segments create smaller spaces that are more efficient to heat and cool.
Seating Capacity	161 including accessible seating
Users	Club de soccer le Venturi de Saguenay, Saguenay Baseball
Construction Cost at Build (\$CAD)	\$27 M (turnkey design-build)
Construction Cost adjusted to 2023 (\$CAD)	\$27.8 M (turnkey design-build)
Cost per Sq. Ft. adjusted to 2023 (\$CAD)	\$412



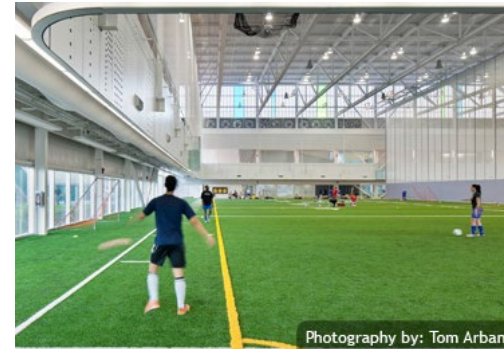
Paramount Sportsplex

Location	Mississauga, ON
Year Built	2007
Size (sq. ft.)	200,000
Amenities	• 3 FIFA-size artificial turf fields - Played as full field, half field or quarter field – 1 indoor, 2 outdoors (1 is domed in winter) • Triple gymnasium - Full-sized competition hardwood basketball court and volleyball court with a practice/warm-up court • Fitness Centre (free weights, cardio equipment, and drop-in fitness classes) • Gymnastics Centre • Meeting space • Licensed lounge • Adjacent to the Paramount Fine Foods Centre Arena (5,400 seat event centre) and Rinks (3 community rinks)
Seating Capacity	250 in gymnasium (expandable to 500)
	75 in domed field
Users	Gymnasium - Mississauga Monarchs Basketball, Raptors 905
	Indoor Artificial Turf – Adult Soccer League, Youth Soccer League
Construction Cost at Build (\$CAD)	\$22 M
Construction Cost adjusted to 2023 (\$CAD)	\$38.6 M
Cost per Sq. Ft. adjusted to 2023 (\$CAD)	\$193

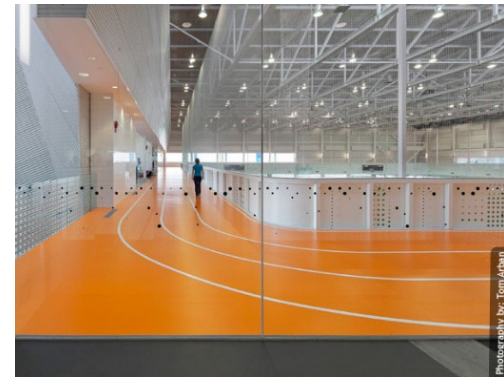


Commonwealth Fieldhouse

Location	Edmonton, AB
Year Built	2012 (renovation/fieldhouse addition opened)
Size (sq. ft.)	215,000, incl. 90,000 square foot field house
Amenities	• Three-level 90,000 square foot field house with an artificial indoor turf field (half regulation size marked for soccer and football) and batting cage • Fitness centre with 300-meter jogging track • Hardwood court gymnasium configured for basketball, volleyball, and badminton • Aquatic centre with 4-lane saltwater fitness pool, climbing wall, waterslide, and spray features • Steam room and whirlpool • Cardio area • Weight room • Two mind/body studios and spin bike studio
Seating Capacity	500, expandable to 1,000
Users	Public - drop-in hours and membership options
Construction Cost at Build (\$CAD)	\$112 M (renovation)
Construction Cost adjusted to 2023 (\$CAD)	\$169.3 M (renovation)
Cost per Sq. Ft. adjusted to 2023 (\$CAD)	\$788



Photography by: Tom Arban



Photography by: Tom Arban

Irving Fieldhouse

Location	Saint John, NB
Year Built	2019
Size (sq. ft.)	110,000
Amenities	• Two indoor turf fields • 200-metre indoor walking/running track • High jump, long jump, and pole vault equipment • Team change rooms • Group fitness studio • Multipurpose room • Fitness centre • Rental opportunities
Seating Capacity	650, expandable to 700
Users	Public - anyone in the community can rent out the facilities. The facility is operated by the YMCA
Construction Cost at Build (\$CAD)	\$27 million
Construction Cost adjusted to 2023 (\$CAD)	\$33 million
Cost per Sq. Ft. adjusted to 2023 (\$CAD)	\$302



Proposed Facility: Soccer Northwest Ontario (SNO) Fieldhouse

Location	Thunder Bay, ON
Year Built	N/A
Size (sq. ft.)	100,000
Amenities	• FIFA compliant artificial turf field • Eight player changerooms • Multi-purpose space • Concession space • Referee changerooms • Administrative space • Lease space

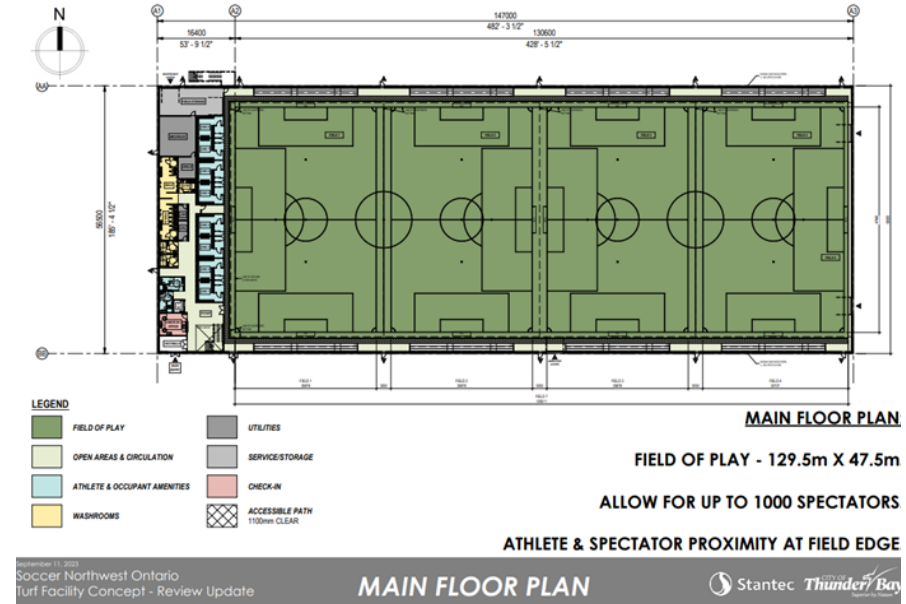
Seating Capacity 960

Users N/A

Construction Cost at Build (\$CAD)

Construction Cost adjusted to 2023 (\$CAD)

Cost per Sq. Ft. adjusted to 2023 (\$CAD)



Honco Lévis Soccer Stadium

Location	Charny, Québec
Year Built	2007
Size (sq. ft.)	66,100
Amenities	- Indoor soccer field divided into 3 soccer fields - Proshop - Multifunctional room - Change rooms - Snack-bar area - Offices - Reception area
Construction Cost at Build (\$CAD)	\$19 M
Construction Cost adjusted to 2023 (\$CAD)	\$26.7 M
Cost per Sq. Ft. adjusted to 2023 (\$CAD)	\$404



Other Details:

Building Type: Pre-engineered Steel Structure (structural panels, ventilated attic roof, two bearing walls and two end walls).

The project was implemented as a public-private partnership.



5.2 Types of Indoor Turf / Hard Floor Structures

Air supported structures are used for recreational and in some cases industrial facilities, providing flexible interior spaces with large open spans. They are most common for turf sports in Atlantic Canada with several examples being installed for these purposes around the region.

Any commercial rental space and support spaces such as changing facilities, storage etc. will need to be housed in a connected traditionally framed structure.

Issues With Domes

Longevity: A typical Air-Supported Structure will last between 15-20 years. In comparison, a Conventional Steel Framed Structure has a typical lifespan of 50+ years.

Energy Cost: An Air Supported Dome will not meet the Energy Code and has substantial heating and mechanical system operational costs, in order to keep the structure pressurized.

Architectural Considerations: There is a limited aesthetic with an air supported structure. Glazing is also not permitted in an air supported structure, so there is a limited visual connection with the building's surroundings.

Maintenance Requirements: Snow removal at the air supported structure edges is required to avoid snow and ice build-up. An air supported structure requires maintenance schedule for capital improvements and annual repairs. Time required for set-up and take-down (lost playing training time).

Building Code: Some communities have experienced permitting issues related to fire protection.

Ventilation and Dehumidification: In an air supported structure there is one dedicated furnace and inflation unit and no air distribution system. Dehumidification is not incorporated with the ventilation. These issues become challenging if one is trying to maintain a constant humidity level for a wood floor.

Collapse: In Atlantic Canada, there have been two notable Air Supported Structure collapses last winter. The first being The East Hants Sportsplex Dome which fell on November 30th after a large storm. Snow and water load created a large tear in the roof of the building. The second was the Cape Breton Health Recreation Complex which collapsed in February, a build-up of snow caused 5 large tears in the side of the dome structure.

Frame supported fabric buildings use solid steel I-beams and fabric. These buildings are designed to last longer, compared to air supported structures, without additional operating or maintenance costs. They are engineered to stand up to high winds, snow loads and seismic activity.

A Pre-Engineered Steel Structure provides a long-lasting building solution with large column-free spans. The structural components are acrylic coated and galvanized providing a durable appearance. These buildings have been used on many recreational projects across Canada, from hockey arenas to soccer stadiums.

The structure can be combined with a variety of wall assemblies. A conventional pre-engineered building wall assembly has a relatively low-cost solution that creates an industrial appearance, because the soft white plastic liner panel containing the insulation is left exposed on the inside.

A Pre-Engineered Steel Building will not have any of the issue with code compliance, longevity (50 years and up), or threat of collapse that an Air-Supported Structure has.

The system has a moderate to good energy performance and better performance maintaining appropriate humidity for a wood floor (should hard-floor gymnasium type uses or a walking/running track be included in the building design).

An example of a pre-engineered steel structure is Honco Lévis Soccer Stadium discussed above.

6. Capital Costs

Class D Cost Estimate

6.1. Basis for Capital Cost Estimates

The costs provided are order of magnitude in nature and should not be seen as definitive project costs. The cost represents a basic assessment of scale and assumes that the building is developed as a single field house in proximity to the existing BMO field house complex, thereby reducing the need for significant additional ancillary space such as would be essential if developed as a stand-alone facility at a new location in HRM.

Because the costing undertaken at this pre-design stage represents the first and most general level of costing (Class D), it can be expected to change as more detailed site planning and design work continues. It is important therefore not to underestimate costs at this stage - it is necessary to include design, construction, and other contingencies as well as sufficient allocations of cost for items that cannot readily be fully estimated at this time.

If Soccer Nova Scotia and any prospective funding partners move forward through the schematic design process, design development and the development of working construction drawings, capital costs are subject to a more granular assessment of individual building components, systems, and other costs. At the same time, as the design progresses, the predictability of capital costs can be more refined which enables a reduction in the capital cost contingency that is added to the initial capital cost estimates. Design development does not remove the need for contingency – development and construction of complex buildings requires that every project carry a contingency for cost overrun, delay, and other financial impacts.

Class of Capital Cost Estimates

Class D Estimate

- Estimate based on initial functional concept design.
- Elemental summary generally based on unit rates, and applied to principle program areas (uses, and overall building gross floor area (GFA).
- Accuracy is generally plus/minus 20-30% depending on complexity of the project and site.

Class C Estimate

- Schematic design completed to 33%.
- Includes an elemental cost estimate based on greater detail of all major elements, enabling refinement of design and costing.

Class B Estimate

- Design development to 50% or higher.
- Represents a detailed construction document upon which to base costs.

Class A Estimate

- Cost estimate based on 100% completion of construction documents prior to tendering.
- Expected degree of accuracy of costs of between 5% and 10%.

The order of magnitude estimate is based on recent examples of projects, as well an assumption of an efficient design and construction process that involves pre-engineered structural and other components.

With respect to site development, the analysis assumes that the development is achievable without incurring extraordinary site-related development costs. Of course, whether the facility is built adjacent to the existing BMO complex, or elsewhere, these costs need to be subject to detailed examination as part of the next phase of design and site planning work.

Contingencies

The effective use of contingencies in construction cost planning requires a clear understanding of estimating risks in both a project specific and general construction market sense. The appropriate level of contingency is dependent on the amount of information available, knowledge of the design teams' methods and philosophy, the timing of the estimate preparation relative to the project design and construction schedule, and the anticipated complexity of the construction work.

A 20% design and pricing contingency has been included in the estimate. This contingency covers the design and pricing evolution during the remaining design stages of the project.

Escalation

Escalation contingency has been excluded from the estimate as the timing of development is not currently known, and escalation is predictable only over the very short term.

Soft costs in this report cover items such as professional fees, permits, pre-construction project management, materials testing, inspection services, legal fees, building FF&E and signage. It is reasonable to allocate soft costs at 20% of the hard construction costs for this type of building.

Capital Costs of a Second Full-Size Soccer Pitch

This report is limited in costing to a single field. Any option to develop two full-size fields under one roof as part of a new complex raises a number of contingent questions that limit the value of preliminary cost estimates. A complex of this scale would raise legitimate questions as to the merit of including a range of other public recreation opportunities, as well as the most appropriate location for a major new addition to indoor recreational infrastructure in HRM. These questions limit the value of capital costing for a larger facility at this pre-design, pre-partnership and pre-site acquisition phase of an expanded project.

6.2 Capital Costs Estimate

The Class D estimate of construction costs for the future new facility prior to the inclusion of soft costs, furniture fixtures and equipment (FF&E), and contingency is approximately \$23.8 million.

Soft costs in this report cover items such as professional fees, permits, feasibility studies (such as this one), materials testing, inspection services, legal fees, building FF&E and signage. We recommend that soft costs be allocated at 20% of the hard construction costs.

After the design and pricing contingency and construction cost contingency this would indicate a total project cost in the range of \$34.5 million.

ORDER OF MAGNITUDE CAPITAL COST ESTIMATE

Building Costs - CORE PROGRAM (Full Size Single Field Complex - at BMO Campus)

Item	Elemental		Unit Measure (Hard Costs per Sq. Ft.)	Hard Costs (\$)
Q2 2024 COSTS - NO ESCALATION	Quantity (Sq. M)	Quantity (Sq. Ft)		
A BUILDING HARD COSTS + SITE DEVELOPMENT	7,000	75,347	\$275	\$20,720,508
B - GENERAL REQUIREMENTS* (10%) AND FEE (5%)				\$3,108,076
TOTAL HARD CONSTRUCTION COSTS				\$23,828,584
SOFT COSTS**			20%	\$4,765,717
TOTAL				\$28,594,300

Contingency for Class D Order of Magnitude Estimate (Cumulative)

1. Design and Pricing	15.0%	\$4,289,145
2. Construction	5.0%	\$1,644,172
Total contingency	20.8%	\$5,933,317

Grand Total for CORE PROGRAM



PSF

\$34,527,617.67

\$458

* General Requirements are Construction Phase Soft Costs

** Predevelopment Phase Soft Costs

7. Operational Considerations

7.1. Operational Considerations

Based on the understanding of the existing operational model for the BMO Centre, we would assume the following with respect to an additional field house built adjacent to or part of the existing field houses:

1. Continued direct operational control by Soccer Nova Scotia rather than contracting with a third-party management organization to provide daily operational management;
2. Development of field turf as the flooring choice, with seating gallery and other amenities as per the existing building. We recognize the potential demand for futsal, and a range of other sports that could benefit from alternative multi-sport flooring for a part of the building (potentially in addition to the full-size field). Note these additional opportunities for space in addition to a full-size soccer field house are not included in the capital costs. These uses, their cost and the operational implications are better assessed for their incremental costs/benefits as part of a more detailed design and business planning process once prospective partners are established and a concept plan developed;

3. Utilization of the field in the same way as the existing fields are utilized – primarily to meet the demands of youth and adult soccer programs and rental demand, with a portion of time allocated to a wide range of non-soccer users that can utilize field turf.

On that basis, we note that Soccer Nova Scotia has been able to develop a capital reserve over the years, and with the completion of debt payments for the existing facility, there is a substantial increase in revenue. Depending on the extent to which funding partnerships can be established for the new project, all of this revenue that was otherwise directed to debt service, will be redirected toward the same for the new building.

Recognizing that the new building will, depending on the level of debt incurred by Soccer Nova Scotia, be able to generate significant revenues that result in an overall surplus for the combined facilities, the principal the business case question is the extent to which cost efficiencies can be maximized by operating the new field alongside the existing fields.

The operating picture rests entirely on the extent to which additional capital funding is achievable. We understand that Soccer Nova Scotia has recently negotiated terms of borrowing which have a cap of around \$10 million. Whether this is extended moderately based on the projected income and debt coverage ratio that can be achieved, or maintained as-is, there is likely to be a need for funding partners.

The advent of funding partners should, in our view, lead to a conversation as to the appropriate mix of uses in a new field house(s) and whether an expanded program of co-located activities is warranted. The overall operating business case, facility management and governance structure will be an outcome of the successful partnership model.

At its core, the facility is, based on soccer demand, able to operate successfully as an addition to the existing financial operations of Soccer Nova Scotia – assuming funding partners can contribute to the capital costs. As to the amount of funding, if Soccer Nova Scotia can achieve a net capital cost of somewhere between 30 cents to 50 cents on the dollar (based on support from both levels of government and potentially HRM), long-term debt is likely supportable.

With specific regard to revenues, the existing overall utilization is in the order of 66% (all hours, all months together). A fully modern field house with state-of-the-art climate control could, we understand, substantially augment the demand for usage during the warmer months. If the overall utilization increases, the revenue profile relative to costs will be enhanced.

The ramp-up period (the time taken for a new facility to operate at its long-term expected capacity) is usually a risk for any new building. In this particular context, the high levels of demand that are likely within the next several years will likely minimize time required from commencement of operations to achieve desired long-term operating capacity.

The above assumptions are reasonable for new field house built in proximity to the BMO Centre and Canada Games Centre. A large facility (two fields) built as a standalone complex elsewhere, may incur a longer-timeline to achieve long-term operational scale – in part because of the second field which would be built to serve longer term (2031) versus immediate need), but also because of the separation from the BMO Centre and the inherent learning curve for a staff operation at a new site.

8. Short-Listing Locations

8. Short-listing Locations

The choice of location for a new facility is in large part a function of the partnerships that can be developed and secured as a basis for capital funding and operating business model. A partnership with HRM, for example, will lend itself to a number of potential locational options, as well as a process of site selection that meets a range of recreation planning, community access, land use compatibility, and financial considerations. A partnership with a school board (example: high school) will also drive the potential locational choice, raising the opportunity of developing as part of a new school development program or a school expansion capital program that may exist. For the purposes of this analysis, we assume that a partnership with the University and College sector is not likely to be viable.

While the partnerships with the Regional Municipality or a major high school can result in a recreation complex that is jointly funded and utilized, a drawback is the challenge in aligning the timelines of each organization. The timing of development for a new facility in partnership with other institutions is beholden to the delays and process by which those organizations both approve projects and develop budgets for their implementation.

While not ruling out partnerships, the following are key locational considerations based on a project under the control of Soccer Nova Scotia and which would be built, funded and operated by the PSO.

1. Regional accessibility – recognizing the importance of serving a large regional service area extending a significant distance from the urban area of HRM;
2. As a potential facility of provincial and regional Atlantic importance, sufficient size to provide for daily and event parking, capacity for expansion in situ, and the potential for development of complimentary indoor and outdoor facilities;
3. Tempering any exaggeration of the need for car-borne, regional accessibility via the intra-provincial highway system, a regional facility should still seek a location that is generally central to the majority of the HRM population, and by extension promotes a specific site that is, or easily can be, accessible by public transit, the major trails system and active transportation in general. For this reason, partnership sites, such as the current BMO Centre facility in proximity to major municipal recreational facilities and educational institutions, is a good example of maintaining accessibility;

4. Compatibility of land use – the current facility exhibits this important benefit, nestled as it is among a City-owned sports field, parks and trails system;
5. Achieving scale and the whole, greater than the sum of its parts. Organizational and operating efficiency – a key locational objective where the capacity for improving existing efficiency, capacity and event hosting reach is evident. This is the case at present where the existing BMO Centre complex offers significant such benefits – all of which have a financial impact. In the final analysis, these benefits will need to be measured against any other drive for locating new facilities away from the existing complex.
6. Availability of suitable, affordable land. At a more strategic level, a decision will need to be made as to whether Soccer Nova Scotia is prepared to factor in land costs to find the appropriate location. This reality of additional costs is therefore a key strategic consideration for any location analysis. If a partnership is achievable with HRM or the school boards, the likelihood of land acquired at a minimum obligation is likely; if no such partnership exists, the choice of site will need to account for the potential to secure land cheaply.

HRM is owner of substantial land assets surrounding the BMO complex including the land on which the complex sits. Accordingly, this site in our view is a leading candidate for the development of a new facility. It should be noted that the capacity of the existing site to be able to accommodate an additional facility in a cost feasible manner has yet to be determined but is an immediate next step in the implementation.

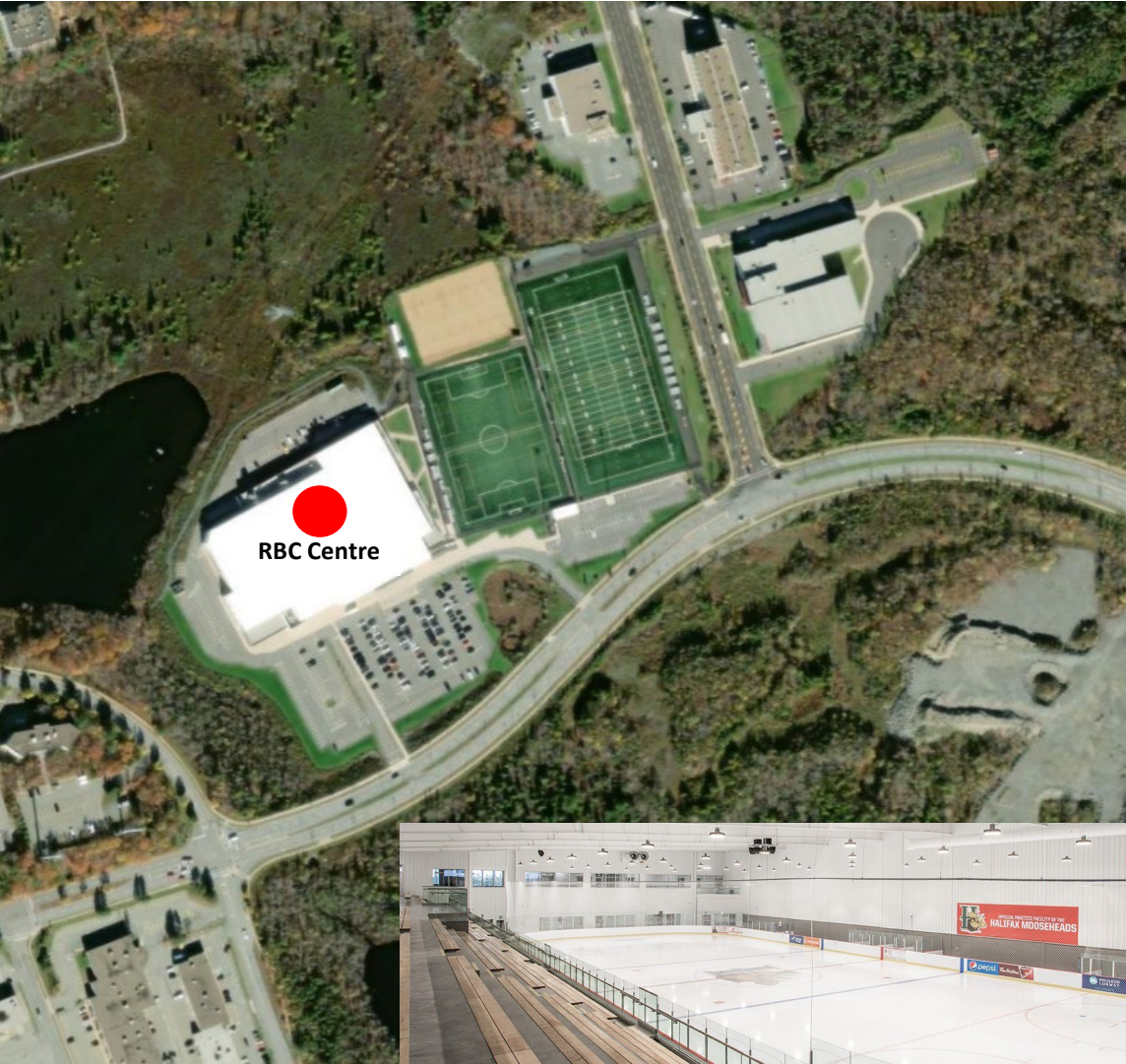
At a specific level, if the existing location is deemed to be the most appropriate site, then there would appear to be several options for more detailed technical review:

1. Building on land between the BMO complex and the parking lot serving the Canada Games Centre (this is generally levelled land of sufficient size to host a new facility. The implications for parking will need to be further assessed);
2. Working with the City to build on the outdoor pitches to provide for a fully functional indoor field house adjacent or joining the existing main field house. It is assumed that an additional outdoor field turf facility will need to be replaced within the City's portfolio;

3. Redevelopment of the existing 1995 field house (currently one third full size) and build a complex that provides a full field and the replacement of the existing indoor field house or even an expansion to a second full sized field house. This may appear overfully aggressive but a detailed technical examination of development feasibility, land development complexity and cost (there is exposed bedrock) on open space between the main parking lot and the residential areas) the option to build bigger and better on the existing development footprint may be more viable than it appears.

It is difficult to identify other lands that suggest the opportunity with the HRM or school boards but we are inclined to assume that conversations with these organizations will begin to focus on the range of site possibilities.

By way of example, the HRM-owned RBC centre (indoor and outdoor) in the Dartmouth Crossing area would have good potential as a site for a new field house complex if land can be made available (if appears that there is land available).



RBC Centre, Dartmouth, NS



Project completed in 2017

Area: 175,350 sf

Project budget: \$42 million

Energy-Efficiency: LEED Silver certified

RBC Centre is a four-pad arena complex in Dartmouth, NS. The RBC Centre is located next to the Harbour East All Weather Field. The Centre hosts Minor Hockey, Varsity Sport, Senior Leagues, and multiple programs. With two major hotels chains – Holiday Inn and Best Western – located in its vicinity, the RBC Centre is well equipped to host competitions and tournaments.

Facilities include:

- ☐ 2 all-weather outdoor fields;
- ☐ 4 ice pads (1 Olympic sized & 3 NHL sized);
- ☐ a large multi-purpose room;
- ☐ a sport retail store;
- ☐ food and beverage services.

9. Recommendations

9. Recommendations – Next Steps

The choice between building a single field or a twin addition is a function of funding and financing capacity, the existence or otherwise of partners - either government funding partners or recreation providers (municipal and institutional). It is also a function of site availability, site size sufficiency and other parameters that can only be determined through a series of next steps to advance the project.

This value of this report lies in its validation of demand and support for a business model that maximizes the use of the existing location while indicating the conditions that would be necessary for seeking alternative locations.

There are, as noted, a range of solutions ranging from:

1. Soccer Nova Scotia to go it alone versus partnership.
2. Regardless of whether partners exist for capital and preferred access to the facility, there are funding partners that should be sought. This can include private operators although we do not view this as a preferred option given the existing integrated role of the existing facilities with the mandate, operational and organizational structure of Soccer Nova Scotia. Private operation – itself ranging in options from full private structure to a simple management contract – is more suited to a municipally owned facility.

The recommended next steps are as follows:

1. Based on this report, address the indoor field house needs of the HRM with both the HRM and school boards. As there are no (or few) domed fields in the region, unlike many other metropolitan areas in Canada, even those in the north, we strongly recommend a series of conversations to establish firstly the commitment of HRM to planning for indoor, dry floorspace. As you may know, the HRM has a strong partnership with the school boards wherein access to the school gymnasiums and other facilities is provided to HRM after school hours and at weekends. Importantly, it is the HRM that allocates time in the facilities as part of its recreational mandate. This is a model of partnership that represents best practice.
2. Undertake a site planning and due diligence exercise to determine the viability of development of a new facility on the existing site – expanding into lands adjacent. As the HRM is the landowner, this investigation should be part of ongoing discussions of joint needs. These studies will need to be funded to bring in required design and engineering professions. Obtain an estimate of site development costs (those are costs associated with ensuring the land is capable (graded, serviced, and geotechnically stable) of supporting the field house building).

3. Reach out to design-build experts in the construction of field houses to obtain greater confirmation of design options and capital costs of the building components specific to the options that exist for the existing complex, including indoor connections to the existing field houses and offices.
4. Undertake an internal financial modelling exercise to confirm debt capacity for the development of a new single fieldhouse, to either confirm or seek increase to the existing bank-approved debt limit.

Note, as this report does not constitute a financial feasibility plan for the project that involves more in-depth concept planning, governance review, functional space programming, operational programming and risk analysis, it is important to undertake the above steps in sequence to fully inform the options open to Soccer Nova Scotia.

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APPENDIX A. CONSULTATION RESULTS

1. ONLINE SURVEY AMONG INDOOR FACILITIES OPERATORS

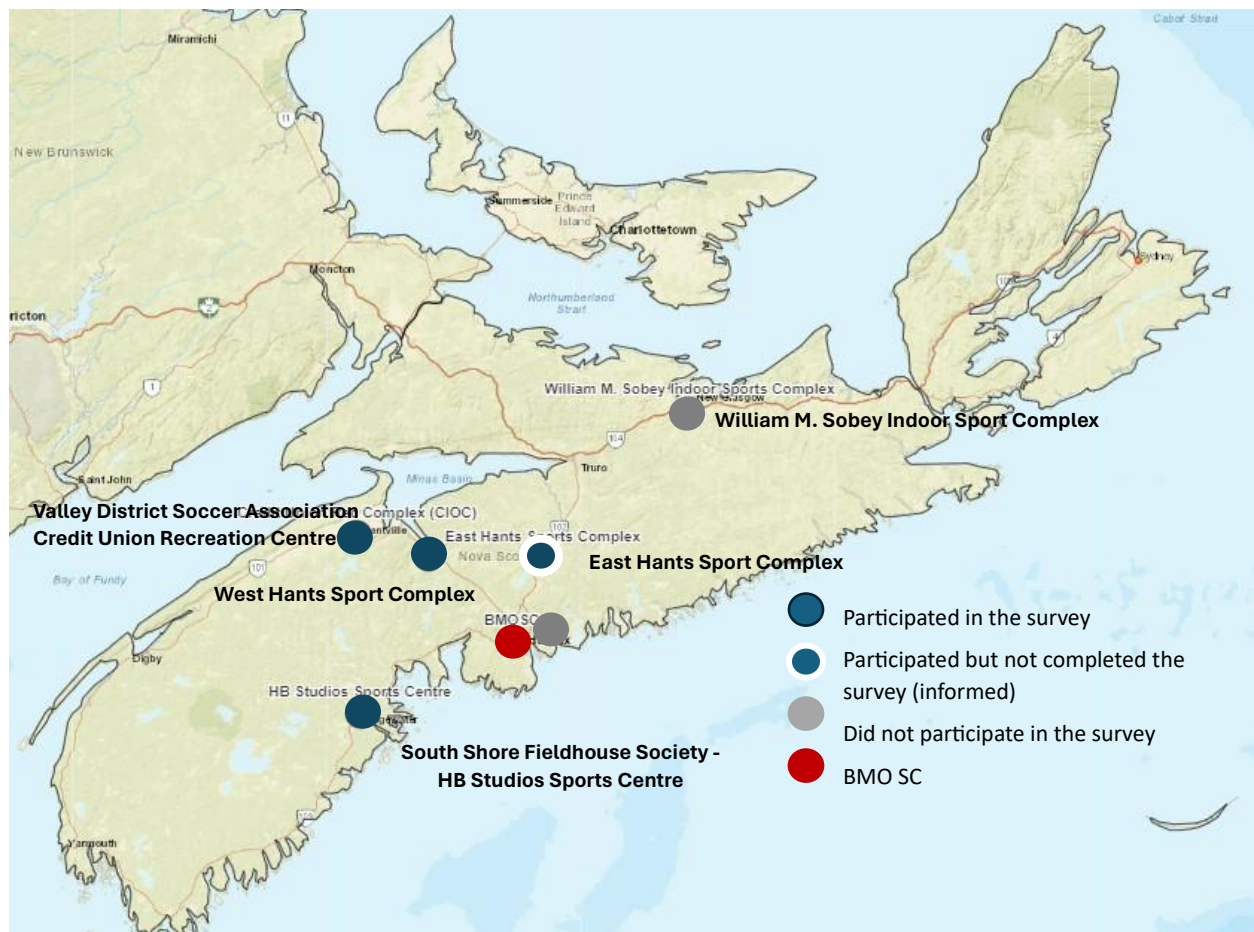
The survey of indoor facility operators was conducted in April 2024 to gain better understanding of a range of needs and demand for indoor facilities (turf and hard surface courts) in HRM and the HRM area.

Indoor Facilities Operators Survey Summary

There are seven indoor turf facilities including BMO SC in HRM and Central Nova Scotia. The survey was sent to 6 indoor sports complex facilities, representatives of four (4) facilities participated in the survey:

1. Valley District Soccer Association - Credit Union Recreation Centre
2. West Hants Regional Municipality - West Hants Sports Complex
3. South Shore Fieldhouse Society - HB Studios Sports Centre
4. Municipality of East Hants - East Hants Sport complex

Representatives of three (3) facilities provided complete answers past Question 2. The East Hants Sports Complex provided only answers to the first two questions.



Three facilities provided information about their main amenities:

Indoor Facility	Amenities
Valley District Soccer Association Credit Union Recreation Centre	100 x 200 ft. turf field with a playing surface 2 regulation squash courts
West Hants Sports Complex	100 x 200 ft. turf field attached ice surface
HB Studios Sports Centre	100 x 200 ft. turf field rubberized track (209m), two-room sensory center, 1 meeting room with a projector and wifi and 1 meeting room with wifi

Operations during summer and winter months

West Hants Sports Centre and HB Studios Sports Centre operate in the summer months.

- West Hants Sports Centre is open for booking during summer months.
- HB Studios Sports Centre operate during reduced hours and rent to Nova Scotia government and community members for private bookings. The Centre commented that they have capacity for soccer programming and training, but currently they are not used for soccer programming.
- Credit Union Recreation Centre does not operate during the summer months.

Direct programs for kids sports, indoor leagues, and other groups

Credit Union Rec Centre offers soccer programs offered directly for minis (U-5, U-7, U-9, U-11), community level youth and community seniors (Senior A men and women, Masters and Ladies Over-30). The Turf is rented to Valley United for performance stream youth and other club-offered programs - NSSL for indoor league games - user groups for many other sports such as football, rugby, ultimate frisbee, etc.

West Hants Sports Complex does not offer direct programming, but they rent the facility to community groups and PSO's to do programming.

Percentage of time used for soccer versus other activities

	Soccer	Other Activities
Valley District Soccer Association Credit Union Recreation Centre	70%	30%
West Hants Sports Complex	25%	75%
HB Studios Sports Centre	50%	50%

Demand for use of space in indoor facilities changing

Credit Union Recreation Centre	Demand is slightly increasing	
West Hants Sports Complex	Demand is decreasing	
HB Studios Sports Centre	Demand not changing	

Waitlists

- West Hants Sports Centre and HB Studios Sports Centre do not have waitlists.
- HB Studios Sports Centre has a waitlist due to occasional time conflict between soccer times and other sports, usually during weeknights.

Booked time as percentage of total available time in the fall-winter season during peak hours

Facility	% of Time Booked in the Fall-Winter Season During Peak Hours
Credit Union Rec Centre	95% Occasional empty hours but generally fully booked
West Hants Sports Complex	75%
HB Studios Sports Centre	75% There are time slots available on weekends and the 4-5 on weekdays that could be booked with some slots throughout the weekdays

Booked time as percentage of total available time in the spring - summer season during peak hours

Facility	% of Time Booked in the Spring-Summer Season During Peak Hours
Credit Union Rec Centre	14% April to first week of May - regular usage declines as programs and league wrap up; May to June - occasional usage (e.g., birthday parties, occasional rentals due to weather conditions, etc.); June to mid-September - no bookings.
West Hants Sports Complex	1%
HB Studios Sports Centre	15% Few bookings in peak time during the summer Opportunity exists to use some organizations' booking time in the facility.

Additional Comments

HB Studios Sports Centre commented that Soccer Nova Scotia could use the rural facilities more for games, training (i.e. coach, referee and player training). Such support from one of the larger provincial sports organizations would help rural facilities to increase utilization and revenue.

2. ONLINE SURVEY AMONG PROVINCIAL SPORT ORGANIZATIONS

There are 55 Provincial Sport Organizations (PSO) in Nova Scotia, of them 11 were identified as relevant for this study. These 11 facilities represent member organizations that use indoor turf, hard surface court facilities and/or gymnasiums.

The survey of these PSOs was conducted in April 2024 to gain better understanding of a range of needs and demand for indoor facilities (turf and hard surface courts) in HRM and the HRM area. Six (6) PSOs (or 54%) participated in the survey as indicated in the table below.

PSOs Contacted And Responded to the Survey

PSOs Contacted	Survey Participants
1. Baseball (Baseball Nova Scotia)	X
2. Basketball (Basketball Nova Scotia)	X
3. Football (Football Nova Scotia)	X
4. Rugby (Rugby Nova Scotia)	X
5. Squash (Squash Nova Scotia)	X
6. Volleyball (Volleyball Nova Scotia)	X
7. Athletics (Athletics Nova Scotia)	
8. Cricket (Nova Scotia Cricket Association)	
9. Field Hockey (Field Hockey Nova Scotia)	
10. Golf (Nova Scotia Golf Association)	
11. Softball (Softball Nova Scotia)	

Use of Indoor Facilities

Survey participants were asked to identify indoor facilities in the HRM area that they and/or their member organizations use.

- Baseball NS, Football NS and Rugby NS use BMO SC;
- Baseball NS and Rugby NS use all seven indoor turf facilities identified in this project;
- Football NS uses six indoor turf facilities identified in this project, except William M. Sobey Sport Complex.
- Basketball NS, Volleyball NS, Rugby NS and Baseball NS use gymnasiums; and
- Squash NS members use squash courts at Dalplex, SMU Homberg centre, Zatzman, Cole Harbour Place.

	BMO Sport Complex, Halifax	Credit Union Rec Complex (CIOC), Kentville	East Hants Sports Complex, Lantz	HB Studios Sports Centre, Bridgewater	West Hants Sports Complex, Windsor	William M. Sobey Indoor Sports Complex, Stellarton	East Coast Varsity Turf Dome	Gymnasiums
Baseball NS	X	X	X	X	X	X	X	X
Rugby NS	X	X	X	X	X	X	X	X
Football NS	X	X	X	X	X		X	
Basketball NS								X
Squash NS								X
Volleyball NS								X

PSO Role In Searching for and Booking Facilities

The survey asked about the role of the PSOs in searching for or booking facilities for indoor play / training. All PSOs have some role in searching for and booking facilities. In general, PSOs sanction and run competitions for provincial teams. Some have responsibilities to booking and searching for all of our high performance and training. Several PSOs help their members to find indoor facilities for winter training. Key themes from individual PSO responses are provided below.

Q.7 Does the PSO have a role in searching for or booking facilities for indoor play / training?	
Basketball NS	Yes, within PSO programming – not for member organizations (limited staff resources).
Squash NS	Occasionally, for PSO sanctioned and run competition or for provincial teams
Football NS	Yes, Football NS has a role in booking facilities. Minor associations search/book facilities.
Volleyball NS	Volleyball NS book facilities for 25 tournaments per year, several weeks of Team NS training as well as for special events.
Rugby NS	Yes. Rugby NS try to find space to offer some programming in the winter months for members, and we have a role in booking and searching for all of our high performance and training academies.
Baseball NS	Only for Provincial programs.

Required Time for Indoor Facilities by Season

During spring- summer season basketball NS requires 60+ hours per week Football NS – up to 20hours per week, and Rugby NS 3 hours. Squash NS does not require indoor time in spring-summer and Baseball NS did not provide an answer. Estimated reported requirement for that season is 80+ hours a week or 360 hours a month among the survey respondents.

Fall-winter season all PSOs reported the need for indoor facilities. A total of 150+ hours required per week for Basketball NS, Squash NS, Football NS and Rugby NS, which would equate to 600+ hours per month. Volleyball NS would require 1000s of hours. Baseball NS did not provide an estimate. The demand is higher considering that the respondents represent 54% of all PSOs that were identified as organizations representing users of indoor facilities.

Q3. How many hours per week do you and your member organizations require in indoor facilities?		
	Spring-Summer Season	Fall-Winter Season
Basketball NS	60+	80+
Squash NS	0	50+
Volleyball NS		1000s
Football NS	16-20	8-15
Rugby NS	3	10
Baseball NS	N/A	N/A
Total Hours Required (based on the survey responses)	80+	150+ 1,000s for Volleyball

Challenges

All PSO respondents agreed that additional indoor facilities are needed – 100% or 6 out of 6 PSOs. Common challenges include limited access to facilities or difficulty booking preferred time during prime-time (evenings and weekends) and prime-seasons (winter-fall). Another common challenge is the size, features of and/or appropriate set-up for a particular sport (e.g., ceiling height, flooring type, need for a full size field, etc.)

Q.4 Do your members raise any issues regarding access to or quality of existing indoor field house facilities? If so, what are the main issues?	
Basketball NS	Insufficient number of gym facilities in the province for the demand of current basketball programming; Additional restrictions implemented by schools restrict access to school-based gymnasiums; Not enough accessible facilities to ensure inclusive participation in sport.
Squash NS	Squash court availability, specifically multiple courts within the same facility which is needed for adequate programming and competition
Volleyball NS	Limited access to courts, especially on weeknights and evenings. Building conditions: low ceilings, poor flooring (e.g., tile floors in elementary school gyms). Size of facility: small spaces - baseline and sidelines are less than 1m from wall to wall. Old equipment.
Football NS	Size of the facility. Needed an indoor facility with a full football field.
Rugby NS	Difficulty in booking facilities. Not enough time available at facilities, during prime-time hours. Difficulty getting weeknights and weekends. Requirements or preferences for having a long standing agreements as opposed to individual bookings (in some facilities).
Baseball NS	Limited access to facilities during peak training hours through the winter and spring, often forcing groups to take time slots that are not ideal for the athletes. Challenges in having appropriate setups for baseball (L-screens, ceiling height, etc.)

Importance of Access to Indoor Sport Facilities for Sport Development

All PSO respondents agreed that additional indoor facilities are important for effective program offering, training and competition. Based on the PSO responses, current supply of facilities is insufficient and additional new facilities are needed for running leagues, accommodate current and future participants, provide more opportunities for competition and training, and to organize High Performance Training (e.g., Rugby NS).

Q5. How important is access to INDOOR sport facilities (turf, hard surface courts) for the general development of your sport in terms of community engagement and long-term athlete development (LTAD)?	
Basketball NS	Hugely important due to insufficient access to facilities to offer basketball programming.
Squash NS	Essential
Volleyball NS	It is our highest priority. Volleyball membership has grown 30% in the last two years, while the number of training and competition facilities has remained unchanged.
Football NS	Very important. Our off-season is November to March. We are limited in the size of groups can be trained.
Rugby NS	Extremely important due to lack of facilities. Cannot run indoor leagues due to lack of facilities, we can only run 1 off events or small scale games at one facility. Also needed more access for our High Performance Training and development of athletes.
Baseball NS	Required for proper athlete development - Given the short window of our competition season (approx. 3 months) and weather challenges, athletes have little time to prepare their bodies for the wear and tear of the sport. Indoor facilities are required for players to properly develop their skills before hitting the field for competition.

Demand for New Indoor Facilities

The final set of questions prompted the PSOs to share their insights with regard to existing demand. All PSOs are growing and observe increasing demand for facilities.

Reported demand for fall-winter facilities is high, for spring-summer facilities the demand is less but still exists.

	Q.6 Do you see demand for use of space in indoor facilities growing among your member organizations?	Demand for INDOOR facilities among PSO member groups	
		Q8. Fall-Winter Season	Q9. Spring-Summer Season
Basketball NS	Yes. Number of member organizations is growing. Not enough facilities to accommodate the growth and effectively find space to host their programming.	Yes. The largest demand season for Basketball NS for indoor facilities. The league play time is October to February.	Yes. Basketball NS provincial team program runs during spring-summer along with member leagues and summer travel programs.
Squash NS	Yes. Participation is growing and demand is growing for facility access.	Yes. almost all our participation occurs in the fall / winter season	Not often. Our season typically is finished by the end of March
Football NS	Yes. The increase popularity of flag football. If we had access to indoor facilities we would be able to expand leagues into the winter months.	Yes. Majority is with in the winter season. Some might move practices indoors end of October/November if there was availability. Majority of outdoor practice facilities do not have lights which limits practices late in the fall.	Yes. Majority of programming is run by PSO
Volleyball NS	Absolutely. We have grown at a steady rate of 5% annually for the last 20 years. Much faster growth in the last two years. Any new facility built in the HRM and many other municipalities would be at capacity the day it opens.	Yes. Volleyball is growing fast.	Less
Rugby NS	Most definitely. All of our members are looking for turf time regularly, and only some are getting it. Rural areas a bit easier to access, but major difficulty due to demand in HRM and Pictou.	Yes. The demand is HUGE and a constant struggle. We get more time than other PSO's but still looking and needing more to fulfill our members and all the activities.	Less. Spring mostly as rugby fields open on June 1, which limits training opportunities. Less need in the summer.
Baseball NS	Yes. Both in HRM and rurally. Membership has been steadily increasing.	Yes. Indoor training camps and programs for most associations.	Yes. Indoor training camps, tryouts and programs for most associations.

Location

The majority of PSOs (5 out of 6) identified the need for a new facility in the HRM / Halifax Region, where a large number of members are located. Volleyball NS suggested anywhere but HRM and Pictou. Other suggestions included CBRM/Cape Breton and Valley Region (which are not in scope of this analysis).

	Q 10. Which area(s) of the province has the greatest demand for indoor facilities?
Basketball NS	HRM since it houses a larger number of our membership. Rural areas – the sport is growing outside urban areas.
Squash NS	Central, Valley, Cape Breton
Football NS	Halifax Region, Valley region
Volleyball NS	Everywhere but HRM and Pictou
Rugby NS	HRM the most, Truro/Pictou
Baseball NS	HRM, CBRM

Comments

The last question provided opportunity for additional comments, suggestions or questions. Several PSOs provided comments, generally re-iterating the need for additional new facilities and amenities of sufficient size. These concluding comments are provided below.

	Q11. Additional Comments and Suggestions
Basketball NS	The need for additional facility space for basketball is key to our future growth and sustainability. We aren't currently able to meet the demands of the sport due to lack of space. Our members note lack of facility space as one of their biggest barriers to programming.
Football NS	A full-lined Football field is something we are looking for within the HRM. It would be utilized by AUS to grassroots.
Rugby NS	With the influx of people participating in sport, and looking for year round sporting opportunities the need for more facilities is evident. We often are left struggling to find facilities at optimal times, and preference is often given to long-standing or historical bookings. We are often left trying to find court space to use (which is not ideal for a contact sport) and that has also got increasingly more difficult leaving us not able to offer some things that are integral to our sport.
Volleyball NS	The facilities Volleyball NS has access to are inferior to the facilities other provinces have which significantly impact our ability to host major National events. The PSO hosted the 14U National Championships for several years but lost that event because we don't have access to a suitable venue.

3. ONLINE SURVEY AMONG SOCCER NOVA SCOTIA MEMBER CLUBS

Soccer Nova Scotia has 50 member clubs in 6 Districts / Regions. Three regions were identified as the focus of this study of the demand for an indoor facility within the HRM area: includes three Soccer NS Districts: 1. Halifax District/ Region, 2. Harbour East District/ Region (Dartmouth), 3. Suburban District/ Region. Additionally, the survey was extended to other regions that include indoor turf facilities. Other districts/regions that include the Highland Region (CC Riders Club and Northern Nova club) and the South Shore District/ Region (South Shore United), the Valley District/ Region (Valley United).

Survey responses were received from 17 member clubs as shown in the table below.

Member Clubs that Responded to the Survey

Member Clubs - Survey Participants
1. Citadel 7 Aside Women's League
2. Citadel High School Ultimate
3. Western Halifax FC
4. Halifax Ultimate
5. Halifax City Soccer Club / Inter Halifax Soccer Club
6. Halifax Hotspurs Soccer Club
7. United DFC
8. South Shore United FC
9. Storm Soccer Club
10. Ignite Soccer
11. East Hants Soccer Club
12. Suburban FC
13. CC Riders
14. Valley United Soccer Club
15. Halifax Dunbrack Soccer Club
16. HCU
17. Porters Lake Soccer Association

When asked “Is the growth of your club constrained by the availability of indoor soccer facilities?”, **the majority of respondent clubs (16 of the 17) said yes, it was.**

Every club voiced their concerns that the growth of their club is constrained by the availability, or lack thereof, of indoor facilities. Summarizing the clubs responses, the constraints on growth of these clubs consist of lack of time and space to accommodate more players and the hours needed in the fall-winter season. A lack of correct training surfaces like turf, limitation of opportunities for adequate and improved training, resources, and overall quality, problems with location of the facilities, and clubs losing committed players due to them seeking out better training opportunities.

The existing constraints and opportunities are summarized as follows:

Constraints:

A shortage of space and turf/gym time was the most prevalent constraint. This impacts the clubs in the following ways:

- Many players, growing demand, not enough space – **clubs have to reduce either space or time or both and some have to turn down new applications.**
- **Club and league growth is limited by the availability of indoor facilities in the winter months.** All survey participants responded that they are unable to accommodate increasing demand as membership is often limited by availability of training time in indoor facilities in winter months.
- Due to limited time and facility availability in the fall-winter season, **leagues are unable to add new teams or individual members.**
- Lack of appropriate winter training facilities and lack of time means **having to turn away potential teams and demand and no room for meaningful development.**
- Clubs require **more training space to be able to offer more programming and provide player development opportunities;**
- **Clubs have to limit the registrations to match the secured rentals.** Availability of time and facilities limits community programs in the winter: “had to turn away dozens of interested players because of the small size of the turf surface.”
- Insufficient access or a lack of access to indoor turf **limits club’s training/LTPD options for teams and players.** Consequently, **clubs loose soccer players who are seeking more appropriate training and development opportunities.**
- Availability of time and facilities limits community programs in the winter **limits opportunities to grow high performance programs that require availability of indoor turf for practice, especially through the winter.**
- While some sessions can be done in gymnasiums, **gyms should be complementary spaces but not a replacement for turf fields.** “We are limited in scope of programming by lack of space to train in. Gyms are not accessible due to the rise in pickleball.”

- Not being able to secure indoor space is **forcing clubs to limit the registrations in order to meet our coaching standards - Kids/Coach Ratio or the training session content and structure.**
- **Clubs have to reduce either time or space.** Examples, a club had to reduce training session length from 1.5 hrs to 1 hr to accommodate the number of children affecting the necessary training time for athlete development.
- **Indoor turf availability has impact on community programs.** A general theme across the majority of answers is that clubs have to limit the number of applications and registrations due to winter indoor space availability.

Opportunities:

- The clubs equate better access to facilities to opportunities to increase memberships, resulting in the growth of soccer and more community programming.
- Expansion of facility provision should be in line with the demand for these facilities.
- Clubs would like to see more competitive teams as well as more community programming/interest/ involvement (e.g. welcome nights for immigrant population).
- There needs to be a correlation between the cost and the value that members are receiving with limited access and time.
- Future benefits to improving player development, including added value to the organizations/clubs.

More detailed responses by member club are provided below:

	What is the name of your club?	Is the growth of your club constrained by availability of INDOOR soccer facilities?	
1	CC Riders	Yes	Increasing number of players over the last two years for our summer programs and expecting continued growth. Due to limited availability of facilities in the winter, the club can take a small percentage of players. Competitive teams have limited practice time in the school gymnasium in the winter with the U15 boys teams doubling up for practice to fit everyone in to Sunday evenings. Availability of time and facilities limits community programs in the winter: "had to turn away dozens of interested players because of the small size of the turf surface."
2	Citadel 7 Aside Women's Soccer League	Yes	No additional time to add new teams to the league and maintain the same number of games during the season.
3	Citadel High School Ultimate	No	
4	East Hants Soccer Club	Yes	The shortage of time and space limits number of players and programs clubs can offer. More facility time would allow for additional field times and programming.
5	Halifax City Soccer Club /	Yes	Facility constraints impact the club's ability to grow and retain membership in the fall-winter season, invest in human resources or grow the winter season operations of the organization.

	What is the name of your club?	Is the growth of your club constrained by availability of INDOOR soccer facilities?	
	Inter Halifax Soccer Club		
6	HCU	Yes	
7	Halifax Dunbrack Soccer Club	Yes	
8	Halifax Ultimate	Yes	We would offer more indoor leagues in fall and winter if the indoor turf time were more easily available. Often have to turn players away because of the limited time we have for leagues.
9	Halifax Hotspurs Soccer Club	Yes	Need more available training space to continue serving the community. "As a primarily senior club we have been informed that we are not entitled to book space the way the other youth clubs are able to at some of the locations as they prioritize youth programming (BMO for example)."
10	Ignite Soccer	Yes	Not having enough indoor time is forcing us to limit the registrations to match the secured rentals // Not being able to secure indoor space is forcing us to limit the registrations in order to meet our coaching standards ;Kids/coach ratio or the training session content and structure. We dropped the training session length from 1.5 hrs to 1 hr to accommodate the number of children affecting the necessary training time for a true development
11	Porters Lake Soccer Association	Yes	Our Club does not have access to indoor turf, which limits training/LTPD options for our teams and players. Local school gymnasiums are affordable but too small for appropriate training for our youth teams which compete in the NSSL year-round. In addition, due to limited gym time available, we are only able to offer indoor programming to age groups 10 and up, and are unable to participate in the Skills Center program which is the signature SNS program for 7 - 11 year olds. Our Club also loses some of the most committed soccer players who are seeking more appropriate training and development opportunities. This can impact and jeopardize team numbers to the point of being unable to field teams at some age groups.
12	Storm Soccer Club	Yes	Storm are trying to grow their high performance program, however, turf is needed for practice, especially through the winter and although some sessions can be done in a gym, it isn't ideal. Only being allocated 2-3 hours of turf on a weekend which usually conflicts with game schedules, hasn't be conducive to Storm being able to grow these programs effectively. It's also impacting our community programs as gyms aren't great for space and therefore we've been having to limit the number of registrations we receive.
13	South Shore United FC	Yes	We do not have outdoor turf, only grass fields. We cannot train outside until June. Indoor turf is only 1/3 of a pitch at HB Studios. We are limited in scope of programming by lack of space to train in. Too many players, not enough space. Gyms are not accessible due to the rise in pickleball.
14	Suburban FC	Yes	Having to travel to East Hants makes it hard for our members to continue playing year round with us as some members bus or are unable to drive due to winter conditions.
15	United DFC	Yes	We have to shave time or space off the programs we run.
16	Valley United Soccer Club	Yes	There is no guarantee that we will maintain the level of hours we get in Kentville, CURC. This hinders program development in the winter season so growth is constrained. We currently get about 12-13 hours per week in Kentville and 6 in Windsor, ideally we would like to have access to 30 hours.
17	Western Halifax FC	Yes	Each season we receive more applications for new teams and players looking for a team. We are getting to the point where we may have to stop accepting new teams or using more late slots which our established teams do not want to do.

Impacts A New Facility Would Have

Member Clubs were asked about potential impacts of increasing indoor turf field and hard surface court availability impact the clubs. The responses indicate that **the impact of new facility will be positive and will help the clubs and leagues to grow programs, games, community programming, competition and grow membership to meet the existing and growing demand**. Clubs responded that they would develop additional club teams (12 out of 17), would program more games (5), more training (4) and more community programs (4)

Q2. How would more indoor turf field and hard surface court availability impact your club? (Please choose only 1 option)	Number of clubs
We could develop additional club teams because demand exists	12
We could program more games for existing teams	5
We could offer more community programming and add competitive teams	4
More training	4
We do not require more time	1

Open-ended comments to this question suggest that the new facility would provide additional space and time and would be beneficial for the clubs and league. Main themes emerging from the comments are as follows:

- More facility time will offer opportunities for more community programming and growth and development of competitive teams.
- More opportunities for community programs will bring in more players and have more community interest/involvement (welcome nights for immigrant population, etc.).
- More facility time will provide opportunity for expansion and accommodating the growing demand.
- Improved cost vs value that members are receiving with limited access and time;
- Lack of time and space for winter training around NS = programming limited and reduced in quality
- Cramming
- Expansion of programmes and clubs needs more time and space in winter
- More access = more members = growth of the game

Potential benefits from the provision of enhanced INDOOR facilities (such as field houses).

Main points:

- Would be used as a meeting space, a place to train new coaches and volunteers, etc.
- Added value to the organizations/clubs
- Would allow for more programming and more convenience
- Enhance quality and value for money
- Lots of demand by SNS and other sports for indoor facilities
- Benefit player development with proper surface and space

- Improved training curriculum with more time and less cramming
- More community programming possible and the ability to welcome more players
- Beneficial social impact and community impact/involvement
- Opportunity to develop additional club teams (based on the existing growing demand)
- Opportunity to program more games for existing team(s)
- A space that the Club could call home would give us a sense of pride and legitimacy, rather than using other facilities storage units and board members/coaches closets to house equipment and kits.

The Level of Satisfaction with Existing Indoor Facilities

The majority of responses were satisfied by the indoor facilities currently used. All clubs report using the BMO SC facility, and all are satisfied or very satisfied.

Clubs that use East Hants and Gymnasiums are less satisfied.

The dissatisfaction responses, were largely based around access, space, location, and time limitations. These clubs would love to have access to more indoor facilities to manage space, time, and location issues. Hard to get school gym time. ECV equipment and facilities are below par. Most of the Gyms we have access to are too small for proper indoor sessions/futsal.

Some clubs use facilities for league-scheduled games but would like to have access to similar facilities for training and programs.

	Very Satisfied	BMO SC, Halifax	Credit Union Rec Complex (CIOC), Kentville	East Hants Sports Complex, Lantz	HB Studios Sports Centre, Bridgewater	West Hants Sports Complex, Windsor	William M. Sobey Indoor Sports Complex, Stellarton	East Coast Varsity Turf Dome, Dartmouth	Gymnasiums	Other Facilities
	Satisfied									
	Dissatisfied									
	Very Dissatisfied									
CC Riders										
Citadel 7 Aside Women's Soccer League										
Citadel High School Ultimate										
East Hants Soccer Club										
Halifax City Soccer Club / Inter Halifax Soccer Club										
HCU										

Halifax Dunbrack Soccer Club									
Halifax Ultimate									
Halifax Hotspurs Soccer Club									
Ignite Soccer									
Porters Lake Soccer Association									
Storm Soccer Club									
South Shore United FC									
Suburban FC									
United DFC									
Valley United Soccer Club									
Western Halifax FC									

Key amenities needed for players and spectators in any new INDOOR facility

Survey participants were asked to describe up to 5 key amenities that are presented in detail below.

Most clubs would like additional rooms and space for alternate use such as meetings and education, fitness, warm up space, viewing areas, storage areas, and private and additional changing areas. The clubs would also like access to food, water, all gender washrooms, and showers. They would also like to see full turf fields and designated areas for soccer.

1.	2.	3.	4.	5.
safe, properly sized turf surface	washrooms	spectator seating	equipment storage	meeting/training room
washrooms in the same hallway as the dressing rooms / Washrooms in the same area as the dressing rooms or in dressing room.	access to showers / Showers	larger entrance way, parents waiting for players space / Water fountain in hallway with dressing rooms	water fountain in same hallway as dressing rooms	two field access doors from dressing rooms
Washroom facilities	Water fountain	Viewing area	Change rooms	

Space / Multiple fields	Washrooms / Better spectator access	Locker-rooms / Separate "warm up" area	Viewing Area / Location - ideally at Airport (centre of province and convenient for both city and rural teams)	Storage Space / Multiple full size 11 aside fields
Turf Field	Futsal Court	Dressing rooms	Meeting rooms	Club offices
Turfed full field	washrooms	Keep it simple and get it built and the clubs will rent it..		
Any new indoor facility must be designated for soccer use ONLY	Any new indoor facility needs a turf surface	Any new indoor facility needs washrooms and locker rooms that are gender neutral	Any new indoor facility needs spectator stands	Any new indoor facility should have safe, secure storage for user clubs
Good turf surface	Change rooms	some sort of spectator space		
Turf fields with proper dividers	washrooms	gym for weight and fitness training // The new facilities should also have a gym for weight and fitness training	storage space for clubs	
hard surface for Futsal games and turf for Soccer games // The new indoor facilities should meet the Futsal field requirements as a minimum	At least one full Soccer indoor field and one futsal official field // Another facility similar with BMO Soccer Centre that has the size of a full Soccer field	education rooms for training, seminars etc	The rental cost should be low enough that would not force the clubs to increase the fees	built in areas with easy access to public transportation // They should be built in areas with easy access to public transportation
team locker rooms	washrooms and private change areas	Toilets	great, safe spectator seating (separate from field area)	storage space and lockers for local Clubs/teams
Multiple fields which are available for bookings evenings and weekends	Spectator area - benches etc	Meeting/classroom/office spaces	Changing rooms	
Proper 11 a side field, full size, ability to divide to 7 and 9 a side	Training area or track - strength and conditioning or space to build it	Soccer Store	Seating/Viewing area for parents and spectators	Common area - social space to allow the players and parents to be comfortable and build relationships - have conversations and make connections
Showers	Change Rooms		Restaurant	

A regulation size field	Washrooms	Would be cool to have the ability to separate the field not just in thirds, but perhaps into the option to split the field vertically too		
Accessibility, gender neutral facilities	Warm up space, limited time indoors to get prepared for games	Change rooms with water bottle fountains		
Central location	Viewing area	Locker rooms	Bar or a place for our players to get together	Large meeting space

As of 2023/24 indoor season, which programs and leagues does your club operate?

The majority of clubs offer U4-U18 programs and fundamentals. 14/17 clubs offer senior leagues, 6/17 clubs offer equity programs, 3/17 clubs offer special needs programs, and other programs such as camps, value added packages, keeper training, U18AA, soccer sessions in lunch breaks, and 18 months - U2. The majority of programs are growing and stable, with only a few programs decreasing for Suburban FC and 1 decreasing for United DFC.

As of 2023/24 indoor season, what was the number of participants in each age group below? Please include numerical answers (NUMBERS ONLY)

U4-U6 Active Start: 23-75

U7-U9 Fundamentals: 45-185

U10-U12 Learn to Train: 15-261

U13-U18 Competitive: 0-401

U13-U18 Community: 20-180

Senior League: 13-1275

Special Needs (e.g. Special Olympics, wheelchair accessible play): 0-20

Equity Deserving Groups: 0-120

Other: 0-59

If you work with other groups, please provide more details here:

CC Riders → We do provide soccer instruction for our local Multisport program

Ignite Soccer → We provide soccer training for YMCA, and a Somali and a Nepalese community group through Sport Nova Scotia. Around 60 kids and adults

Porters Lake Soccer association → When possible we offer U8 and U10 programs but were unable to due to limited space in 2023/24.

Storm soccer club → We would love to be able to create more programming for those with special needs etc, but available facilities and training time has been limited and paused us being able to achieve this.

South Shore United FC → We work with all our local summer soccer clubs. They only run during summer months and have similar issues with access to turf or indoor facilities to allow programming to run for more than just June, July and August.

United DFC → We work with Special Olympics

What is the general number of INDOOR hours per week that each group requires turf field and/or hard surface court? Please indicate if that's a full field or 1/3 field or an indoor gymnasium, etc. (Example: 1 hour 1/3 field / 1 hour full field)

	U4-U6 Active Start	U7-U9 Fundamentals	U10-U12 Learn to Train	U13-U18 Competitive	U13-U18 Community	Senior League	Equity Deserving Groups	Special Needs Groups	[Insert text from Other]
CC Riders		3 hours <1/3	1 hour <1/3	4 full gymnasium	2 <1/3				
Citadel 7 Aside Women's Soccer League						12 hours full field			
Citadel High School Ultimate									
East Hants Soccer Club	1/3 of Full Dome- 1hr/week	2/3 of Full Dome- 1hr/week	Full Dome- 1-3hr/week	Full Dome- 3hr/week		Full Dome/2hr/week			
Halifax City Soccer Club / Inter Halifax Soccer Club	4 x 1 hour 1/3 field	10 x 1 hour 1/3 field & 16 x 1 hour indoor gymnasium	16 x 1 hour 1/3 field & 20 x 1 hour indoor gymnasium	20 x 1 hour full field & 10 x 1 hour indoor gymnasium	12 x 1 hour 1/3 field & 12 x 1 hour indoor gymnasium	4 x 1 hour full field & 4x 1 hour indoor gymnasium	2 x 1 hour 1/3 field	2 x 1 hour 1/3 field	
HCU									
Halifax Dunbrack Soccer Club	2 hours turf (1/3 field)	2 hours turf (full field)	2 hours turf (full field)		2 hours turf (full field)	2 hours turf (full field)			30 hours turf (full field)
Halifax Ultimate						6 hours, 1/3 field	2 hours, 1/3 field		
Halifax Hotspurs Soccer Club						24hrs minimum of 1/3 but could use a full field for the same number of hours			4 hours 1/3 field minimum but could use full field & 2 hours gymnasium minimum
Ignite Soccer	3 hrs. 1/3 field	3 hrs. 1/3 field	3 hrs. 1/3 field	4.5 hrs. 1/3 field , 1 hr. Full field	4.5 hrs. 1/3 field	3 hrs. full field	2 hrs. 1/3 field		2 hrs. 1/3 field
Porters Lake Soccer Association			12 - 15 hours half or third of a field		10 hours full field				

Storm Soccer Club	1.5 - 1/3 field	3 - 1/3 field	4 - 1/3 field	6-8 - 1/3 field but exhibition game time so some hours full field	4 - 1/3 field	2 - 1/3 field			
South Shore United FC	2 hours 1/3 field	2 hours 1/3 field	4.5 hours 1/2 field plus games	4.5 hours 1/2 field plus games		3 hours 1/2 field plus games			
Suburban FC	3hrs (full field)	6hrs (full field)	9hrs (full field)	12hrs (full field)	3hrs (full field)	3hrs (full field)	1hr (1/3)	1hr (2/3)	2hr (full field)
United DFC	1 hour gymnasium	1 hour gymnasium plus 1 hour third of turf	1.25-2.5 hours of turf or gymnasium (at least 1 turf) third of turf or 2 thirds depending on SC size	1.25-4.5 hours of turf on a third	1 hour of gymnasium	1 hour third of turf to 3 hours third of turf		1 hour gymnasium	
Valley United Soccer Club	U4-U5 1 hour 1/3 field	U4-U5 1 hour 1/3 field	U10-U12 12 hours 1/3 field	U13-18 22 hours 1/3 field	0	Senior 4 hours 1/3 field			
Western Halifax FC						40 hours 1/3 Indoor Turf			

Waitlists:

The survey asks if any of the INDOOR programs have a wait list. The general response from these clubs was that yes, most programs have a waitlist.

	Open-Ended Response	Open ended response
CC Riders		
Citadel 7 Aside Women's Soccer League	Yes. Winter league has a new team waiting to join. If space allowed we could add two teams we have enough interest.	
Citadel High School Ultimate		
East Hants Soccer Club	Yes we have waitlisted players in age groups before due to the facility space/times available.	EH is an inclusive club and EH Sportsplex has accessible facilities, club works with community organizations to ensure players have an opportunity to play
Halifax City Soccer Club / Inter Halifax Soccer Club	Most of our indoor programs, particularly on the boys have waitlists in the winter	
HCU	No, we don't offer wait lists. This is poor customer service on our mind. We know how much turf is being given to us well before program formation, we make a decision on what we can offer based on what turf we are given. When we open registration, we have caps on our sign ups at a first come and first serve basis starting with our members and opening to the public. If we were allocated more turf time, we could offer more programs.	
Halifax Dunbrack Soccer Club	Yes, and we often have to turn away players due to insufficient facility time.	We actively encourage women matching players and offer leagues specific to this group when possible.
Halifax Ultimate	Yes, most of our draft leagues end up with a waitlist because we have to cap the number of participants	
Halifax Hotspurs Soccer Club	Yes, we have at least 4 teams with waitlists	we run newcomers programs for children age 3 to 18 with ISANS, YMCA and Sport Nova Scotia. Between 100 and 150 kids per year independent of our club membership
Ignite Soccer	camps and competitive training	
Porters Lake Soccer Association		All our programs are inclusive and we've ensured we have a group of diverse coaches on hand to assist with this programming and ensure our programs are accessible and inclusive to all.

Storm Soccer Club	Most of our programs currently have a wait list as we've been restricted on the facility space and time allocated	At this time we do not run away any individuals and accommodate all as much as possible within our limits. No player is turned away if at all possible. However, we do not have the facilities and indoor time to properly give a safe space to every group we wish to.
South Shore United FC	We do have wait lists for programs at U5, U7, U9. Space, time and coaches as volunteers are barriers. We can eliminate wait lists with larger indoor facilities where we can expand to offer youth employment, through grants, to allow us to coach more kids.	
Suburban FC	Yes - All programs	Tri-Preston Program, Special Olympics Program, Safe Space Program - these are for U6-U18 across the 3 domains
United DFC	Not at this time	
Valley United Soccer Club	I am not aware, this would need to be confirmed by the facilities.	Although we specifically have any of these programs, we are open to all that wish to play in our League.
Western Halifax FC		

The following was provided as open-ended comments:

CC Riders	Our club is part of SNS and the NSSL, but it feels like if you don't operate within the HRM than you get very little consideration for facilities, training opportunities, being involved with community partner events (i.e. Wanderers, Whitecaps, etc) It becomes a two tier system where the players who can afford to travel for camps, games, etc are the ones who move forward in the sport. Players are overlooked for advancement opportunities
Citadel 7 Aside Women's Soccer League	Players should not have to cross the main lobby for access to washrooms or water fountains. Its always a crowded space between games, often with lineups.
East Hants Soccer Club	Having enough facility time and space would enhance soccer programs, field space to warm up, accommodate age groups to run programs efficiently as well as to allow for clubs to have access to play more games- build an equal and balanced schedule. Also looking at having a facility near the airport would be a great location.
Halifax City Soccer Club / Inter Halifax Soccer Club	While it is clear that we need more indoor facilities to grow the sport, we are concerned about how the time will be distributed amongst clubs. There is already a growing inequity between certain clubs and the amount of time they have available in the Winter. This allows other clubs to recruit players by having the ability to offer more training without the other clubs having the ability to solve the problem. We are also already at a point where we are pricing kids out of soccer in the Winter. We pay almost double in the winter what we pay in the summer for turf access, and for 1/3 of the space at that. Ways to bring in revenue without putting it back on the membership need to be explored. Lastly, our club is concerned that Soccer Nova Scotia will take on the management of a new facility directly, which will make it difficult for them to balance what is right for the sport and its members, with trying to make a profit on the building operations. The question that concerns us the most is the impact of this when making decisions that support the facilities vs the members who need them.

Halifax Dunbrack Soccer Club	Soccer is a sport played on grass/turf. Players should not have to settle for training on gym surfaces that were designed for court sports. We do not ask hockey players to train in a gym and play on ice, so we shouldn't ask soccer players to train in gyms and play on turf.
Halifax Ultimate	As an ultimate frisbee organization, we are very grateful for the facility BMO provides to us. We love using the current facility and would definitely rent more fields if space allowed. Thank you for including us in this survey!
Ignite Soccer	multifunction space that can be switched for soccer(turf) and futsal (hard floor) An area for weight and fitness training would be highly recommended including athlete recovery amenities (physio, sauna etc.). Classes for conferences, workshops and facilities for coach education.
Porters Lake Soccer Association	As mentioned, there is very limited access to indoor training or playing space on the Dartmouth side of HRM, putting our players, teams and families at a disadvantage. The BMO training center is over an hour away for most of our members, making it difficult to even participate in the indoor league in the winter due to the distance and travel times and not a viable option regular weekly training.
Storm Soccer Club	Cost of turf through the winter is also an ongoing issue with prices increasing each year. It's a struggle for us to keep our costs low and still be able to provide robust programs to all age groups.
South Shore United FC	As we see more and more changes to weather patterns, locally we have moved further away from the request of a dome facility. There does not seem to be a good alternative to the dome which can withstand our weather patterns other than a larger solid roof building. Hopefully a more robust technology, that is cost effective, can be found.
United DFC	ECV as the only Dartmouth option for indoor space is very precarious. We feel they could pull the facility from us after 1 bad conversation. It is not a safe facility, nor does it have a long lifespan. We will be looking to claw back some time at BMO this coming winter season to make up for time that ECV has taken back from us.
Valley United Soccer Club	Indoor facilities are required in the Valley, it is a risk to grow the sport for VUSC as we are constrained by indoor hours. Myself and the VUSC board are working on options for indoor capacity our strategy planning. We would appreciate the opportunity to have the SNS team come to a VUSC board meeting and discuss and support or collaboration. Thank you Troy
Western Halifax FC	We believe the Senior Leagues are growing year by year and with more access to facilities, it would only grow faster.

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