



May 2, 2005

To: The Board of Governors of Exhibition Place

From: Dianne Young
General Manager & CEO

Subject: **The Canadian National Exhibition - Role & Requirements**

Purpose:

This report is submitted for the consideration of the Board of Governors.

Financial Implications and Impact Statement:

There are no financial implications resulting from the adoption of this report.

Recommendation:

It is recommended that the attached report from the General Manager of the CNEA dated February 10, 2005 with respect to the "Canadian National Exhibition - Role & Requirements", be received for information.

Background:

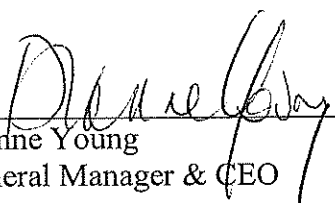
The attached report was received for information by the Board of Directors of the CNEA at its meeting of February 24, 2005.

Comments:

This report outlines the CNE's ongoing role and space for its activities. The General Manager of the CNEA will provide a power-point presentation at the May 27, 2005 meeting of the Board and an invitation to the Directors of the CNEA will be extended to hear the presentation.

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Dianne Young
General Manager & CEO
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The following report was reviewed by the Executive Committee at its meeting of February 17, 2005 and is referred to the Board of Directors for INFORMATION.



February 10, 2005

To: The Executive and Board of Directors
Canadian National Exhibition Association

From: David Bednar
General Manager

Subject: **"The Canadian National Exhibition - Role & Requirements"**

Recommendation:

This report is submitted for the information of the Executive Committee and the Board of Directors, for referral to the Board of Governors.

Background:

At its meetings of November 18, 2004 the Executive Committee reviewed, considered and amended the recommendations of the Ad Hoc Past Presidents' Committee related to the Future of the CNE. They also requested that staff update the June 2003 CNE Needs/Uses & Planning Report and that this report be presented to the CNEA Board and referred to the Board of Governors.

At its meetings of January 2005, the Executive Committee and the Board of Directors reviewed the "The Canadian National Exhibition – Role & Requirements, January 2005" and asked for a chart to be included which would summarize the activities on site and their requirements both current and future.

Discussions:

Please find attached as Appendix A "The Canadian National Exhibition – Role & Requirements, February 2005". This updated report reflects the CNE's ongoing role and outlines the space requirements for our activities, including a summary chart.

An Introduction and a "Case" for the CNE is presented to provide our Executive and Board of Directors with an overview of the existing CNE situation. This report may go forward to the Board of Governors to assist them in their deliberations regarding the possibility of their merger with Ontario Place.

Once more information is received from the Board of Governors regarding the possible merger, we will be in a position to submit our recommendations in the face of any changing circumstances.

Respectfully submitted,

David Bednar
General Manager

The Canadian National Exhibition Role and Requirements

February 2005

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INTRODUCTION

The CNE is the largest community celebration in Canada, steeped in history and tradition going back to its founding in 1879. The public's affection for the CNE has been expressed in many ways over its history. In person, in letters, in research surveys, in focus groups, in economic impact studies, on the telephone and over the internet, the message has been consistent and clear: people feel very strongly about the CNE. One of the few positive things to emerge from the 2003 power blackout that closed the first four days of the fair, was the public outcry and sense of ownership the citizens of the city felt for The EX. It was, and is, a *civic* event; it was and it, *their* fair.

The CNE has seen many changes throughout its history, which has been a grand history of countless "firsts" and remarkable achievements. It is a history that has always celebrated the "old" and heralded the "new". The challenge facing the CNE is that we must continue to adapt to change and accurately reflect the evolving face of the city, but it cannot change to such an extent that it is no longer what people recognize and embrace as the CNE – as *their* fair. Recent events have raised the question of how much change the CNE can weather.

As one of the largest and oldest community celebrations in the country, the Canadian National Exhibition deserves proper recognition in all of the debates regarding its future, including the City of Toronto's desire to make "better use" of Exhibition Place; the general ambition to revitalize Toronto's waterfront; and the proposed merger of Exhibition Place and Ontario Place.

This report establishes a basis for that recognition by describing the CNE's role in the community and outlining its essential requirements.

SUMMARY

ROLE

As individuals and as a community, the CNE gives us a sense of where we have been, where we are, and where we may be going. It is a special time for us to take time away from time. *This unique value of the CNE is that it offers fun "hands-on" activities, entertainment, and education for all ages at a reasonable cost.* The CNE is connected to the community and reflects its past, present and future. It makes significant social and economic contributions to the community. It celebrates ongoing social and family traditions and helps to create new ones.

REQUIREMENTS

There is a fundamental relationship between the CNE, its location, and its size. These elements work together and prop each other up like the legs of a stool. *The complexity of this interdependence has led the CNEA to oppose residential construction on Exhibition Place lands and adjacent lands south of the Gardiner Expressway and to oppose year-round retail on site.*

Either development would be fundamentally incompatible with the CNE. In order to thrive in this role, the CNE has basic needs as follows:

Location: As a practical matter, the CNE needs Exhibition Place and Exhibition Place needs the CNE. Proximity to the waterfront and inclusion of Ontario Place are key elements in that they affect the traditions and size of the event, as well as the special place the CNE occupies in the hearts and minds of the community.

Status: It is vitally important for the CNE to maintain its status as an Agricultural Society and the powers vested in it by the Agricultural Society Act and the CNEA Act.

Stature: The CNE must be socially relevant and reflect the diversity of the community. It must provide activity, entertainment and education that, while they are fun, are also meaningful to visitors. Also, as mentioned above, the size of the CNE (both attendance and number of days) adds to its public stature.

Safety: Must be able to accommodate up to 200,000 per day – food, washrooms, rest areas, emergency services, parking and transit.

Space / size: Have access to interior space of approximately 1 million square feet

- 450,000 sq ft for attractions, and
- 550,000 sq ft for commercial exhibits
- 195 acres of exterior space

Food Building: Obviously, there is wide latitude for adaptation of many areas and buildings on the grounds. One notable exception would be the Food Building. Research conducted in 2003 clearly demonstrated that this unique institution represents much more than “just food” to CNE patrons. Elimination of the Food Building would have an extremely detrimental affect on attendance.

Parking: Parking contributes just over \$1,000,000 to the CNE bottom line, but parking is also linked to attendance. The importance of parking to our visitors is evident particularly those who attend the CNE with very young children and out of town visitors. In addition, the inventory of parking facilities operated by other operators in the neighborhood has been drastically reduced making the CNE’s parking facilities even more important to our visitors.

THE "CASE" FOR THE CNE

FINANCING

The City of Toronto retains any operating surplus generated by the CNE and by agreement, assumes responsibility for any operating deficit incurred by the CNE. The CNE does not rely on government grants for its operating budget. The fair-going patrons, the concessionaires and exhibitors who serve them, and corporate sponsors pay the bills. The CNE has generally returned more operating surpluses than deficits. Analysis of the period from 1950 to 2000 indicates a cumulative cash return to the City of Toronto in excess of \$9 million despite a poor showing during the decade 1990 - 1999. These operating surpluses are in addition to significant contributions to the year round expenses of Exhibition Place (\$3.1 million annually). *Contrary to common misconception that the CNE is a burden to the taxpayer, the CNE is in fact a self-sustaining operation.*

ECONOMIC IMPACT STUDY 2003

The CNE generates additional spending on goods and services in the local economy each year. A multi-event study conducted in 2003 by the Festivals and Events Ontario (FEO) and the Ontario Ministry of Tourism and Recreation (OMTR) calculated the economic impact of a wide variety of festivals and events across the province of Ontario. The study was jointly funded by FEO and OMTR, along with each of the 25 events involved in the project. This study revealed that The Canadian National Exhibition attracted more than \$48 million to the Toronto economy and more than \$66 million to Ontario in 2003. The survey also determined that CNE was the most well known event among Ontario respondents. In total, 96% of adults surveyed had heard of the CNE, which resulted in an awareness level of 8.0 million across Ontario.

EMPLOYMENT

The CNE is a major provider of summer student employment. The CNE hires approximately 1,500 seasonal staff to augment its full time staff. It is estimated that an additional 6,000 people are hired by our CNE partners including Emergency Services, Toronto Police, Toronto Fire, Food Exhibitors, Vendors and Concessionaires. Both TTC and GO Transit augment service to accommodate CNE patrons.

An average of approximately \$15,000,000 is spent annually on employment at the CNE, including direct employment by CNEA and estimates of employment by concessionaires, exhibitors, service providers and other partners.

RESEARCH RESULTS

Each year, the CNE conducts extensive research to determine visitor demographics, trends and expectations, and to monitor visitor response to the CNE's existing programs and attractions. Key attendees, as evidenced by visitor satisfaction and per cap spending, remain families with children (ages 6 to 11 years) within the Greater Toronto Area. A key marketing strategy of the CNE in recent years, has been to position the fair as a family tradition, offering "something for everyone within a safe and clean environment". Research results are subject to annual review and are used to assess changes that may be needed in the CNE's programming, marketing, site layout, customer service, etc.

SOCIAL BENEFITS

The CNE has quietly continued and expanded several programs which benefit many segments of society.

School Pass Program

Each year over 1,000,000 free admission Kids passes are sent to 2500 schools in the GTA and Southern Ontario.

Community Outreach

The Community Outreach Program enhances and encourages good relations between the Canadian National Exhibition and the community it serves. The Outreach Program also functions as an effective means for The EX to maintain a high profile within the community throughout the year. The program is comprised of two major areas of activity: 1) the presence of the CNE mascot (AL-EX, the beaver) at community events and 2) public speaking engagements. The program has grown significantly since its inception, and AL-EX has become a popular fixture in countless parades and at dozens of community events each year.

Volunteers

In 2004 the Friends of the CNE Volunteer Program had 108 volunteers who contributed a total of 2,563 hours to the fair. This highly successful program attracts volunteers from all walks of life, all age groups and a wide range of multi-cultural backgrounds. The Friends of the CNE Volunteer Program reflects the community in which we live.

Accessibility

All people with visible disabilities, along with a companion if required, are allowed free access to the CNE. The Boy Scouts of Canada are on site each year to provide wheelchairs and assistance to those in need. Certain days of the fair are planned as Accessibility Days to raise awareness of accessibility issues, including the needs of the; visually, physically, mentally and hearing impaired. Highlights include social services and products as well as sporting equipment and services for this sector, and showcasing artists with disabilities.

Green Advocacy Program

The CNE promotes programming around Tree Advocacy throughout the grounds, including labeling of existing trees, seedling give-aways, and information regarding urban reforestation. In conjunction with Hydrogenics (hydrogen fuel cell) and Toronto Renewable Energy Co-operative Wind Power (wind turbine), we create programming with environmental themes, highlighted by Green Day. This day includes dozens of other groups that promote environmentally friendly practices.

Child Awareness

Although the CNE promotes itself as a family friendly event, we have focused a number of programs around early childhood education and services through young parents through our child awareness program. Involvement of many government and community partners allowed us to create an early childhood centre in the middle of kids world that offered educational programming, storytelling and resources for young parents.

ACTIVITIES OF THE CNE

AGRICULTURE

Farm, Food & Fun

Current location:	Automotive Building
Area Required:	80,000 square feet
Requirements needed:	We are displaying a working farm; building must meet needs of Agricultural partners

The roots of the CNE were formed around agriculture, it is important that we continue to emphasize our working farm exhibit. It continues to be a popular, educational destination for families.

Garden Show

Current location:	NTC
Area Required:	40,000 square feet
Requirements needed:	Adequate natural light

A popular venue for all and Canada's largest competition, as well as being very budget friendly, the Garden Show would require a minimum square footage of 40,000 square feet.

Horse Palace

Area Required:	30,000 square feet
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The horses have traditionally been stabled in the Horse Palace, which remains open to the public for educational programming and to watch them be prepared for their presentation or competition.

Horse Show

Current location:	Ricoh Coliseum
Area Required:	30,000 square feet
Requirements needed:	Ring area 100'x 200', seating for 1,000 +

Given its long standing tradition at the annual fair, the 2005 Horse Show is being given additional prominence by extending its dates forward to the beginning of August. In order to continue operating, we would require the use of the Horse Palace as well as a ring area of 100' x 200' and seating for no less than 1,000 patrons.

AIR SHOW

Current location:	Waterfront
Area Required:	Current Staging
Requirements needed:	Full Waterfront setup for viewing

ATTRACTIONS/SPORTS

Baseball

Current location: Baseball Diamond

A 49 year tradition, thousands of young people are involved annually in the PeeWee Baseball tournament along with other baseball initiatives. Currently using every square foot of the Ballpark and would need the same space as a minimum requirement.

KidsScience

Current location: Double Unit of Centennial Park

Area Required: 10,000 square feet

Since its inception in 2001, KidScience has been an integral part of the family experience at the CNE. Displays and activities that entertain kids and adults alike continue to be the tradition in this highly interactive, fun and educational area. Part to Kids' World and rated as one of the top family attractions, KidScience could use up to 30,000 sq/ft more space adjacent to Centennial Park.

KidsWorld

Current location: Centennial Square

Area Required: 35,000 square feet

An award winning Kids' World flanked by the Kiddie Midway remains high on the list of "must-do" attractions for families with young children. At present, the current space in Centennial Park is the ideal size and location for this program.

SportsZone

Current location: Better Living Centre

Area Required: 40,000 square feet

Requirements needed: Indoor space

Sports is a long running tradition of the CNE. Programming of sports shows and activities in the BLC consists of 3 major areas which utilize approximately 40,000 sq/ft. of indoor space.

Outdoor sports initiatives have over the past few years utilized the North Grandstand, Ontario Drive, Lot H, portions of Lot D to name a few.

ENTERTAINMENT

Bandshell Park

The set up for Bandshell Stage and Park is ideal for mini-festivals and theme-days. In the past few years we have presented Accessibility Days for various groups representing the handicapped, the Festival of Bands, a competition of bands and orchestras from across the province of Ontario, and hosted multi-cultural groups from every part of the world.

Bandshell stage

Current location:	Bandshell Park
Area Required:	Seating for 3,500 – 4,000 – park size

One of the few venues that allows for concerts and large gatherings. Along with seating, the park holds up to 10,000 people.

Parades

Current location:	Dufferin Gates, Princes' Gates, full grounds
Requirements needed:	Parade lane needs to be wide enough to create parade and room for viewers and marshalling and dispersal areas

The annual CNE hosts a number of annual parades on the grounds during the fair. These parades help the CNE maintain links with the various sponsors of these parades. These parades include the Warriors Day Parade, the Shriner's Parade, and the Labour Day Parade. The Warriors Day Parade is a glorious event celebrating our veterans and the parade route begins outside the Princes Gates and down Princes' Blvd. The annual Labour Day enters through the Dufferin Gates. For 2005, the CNE is bringing back the fun and glory of an on-site parade. The parades also require marshalling areas.

Stages/Strolling Artists

Current location:	Throughout grounds
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Along with the midway and all the pavilions, the CNE offers a number of stages and strolling artists throughout the grounds. The Celebration Stage offers illusionists, hypnotists, comedy acts and our Rising stars Competition. The Midway Stage offers the best in tribute bands daily. The International Stage presents some of the more popular artists of different ethnic backgrounds. The Outdoor Casino Stage, the Thirsty Cactus and the Rock Valley stage offer musicians. Throughout the grounds, strolling musicians, magicians, mime artists and a variety of others amuse and enthrall our visitors.

Remember When . . . Pavilion

Current location:	East Annex
Area Required:	30,000 square feet

Our Senior's Pavilion remains one of the most popular places during the fair and houses our Archives Display.

FOOD BUILDING

Current Gross Revenue:	\$850,000
Current location:	Food Building
Area Required:	150,960 square feet
Requirements needed:	Fully serviced building with sufficient exhaust hoods for 100 exhibitors, sufficient space for 110 permanent booth structures, adequate space for seating and provides off season storage

The Food Building has been a CNE tradition for over 80 years. Year-in and year-out, visitor research indicates that over 80% of CNE attendees visit the Food Building. The Food Building ranks as highest attended attraction at the Canadian National Exhibition and is unique in the Canadian fair industry, if not in North America. It is difficult to imagine that this "concept" could exist in another building unless such a building were to be purpose – built for this activity.

Since its introduction at the CNE the role of the Food Building has shifted significantly. At one time the Food Building was a place where food manufacturers could display sell and of course sample all of the latest food products that were being introduced to the market at that time. With the introduction of TV food shows, in – store sampling and cooking demonstrations, the participation of food manufacturers diminished over the years.

The void left by the decline of food manufacturers was quickly filled by a mix of ethnic food vendors, corporate chain fast – food producers and individual family operators. Although research shows that our consumers miss the many sampling opportunities formerly provided by the food manufacturers, the Food Building remains a very important destination for visitors. The Food Building offers a wide variety of food products and products that are unique to the CNE. Visitors to the fair know that the Food Building offers a range of unique Ex foods that are only available in the Food Building during fair time.

The CNE Food Building is a unique attraction that holds a certain place in CNE visitors hearts. The potential demolition of the Food Building would not only eliminate the over \$850,000 made from the Food Building in rentals and service revenue but would also have a significant negative impact on attendance at the CNE, and would reduce summer employment opportunities. A decrease in paid attendance and overall spending on the grounds would have negative impacts on parking, concession and other revenues. The Food Building is a key motivator for visitors to attend the CNE and is the number one destination at the fair. The Food Building should be maintained in its current location and structure.

MIDWAY

Current Gross Revenue:	\$4,101,750
Area Required:	1,270,000 sq. feet (32 acres)
Requirements needed:	Fully serviced site with service ports for electrical, portable water and sanitary sewer

The CNE main midway and kiddie midway are key programming elements of the Fair. Midway operations account for just under a quarter of total revenues generated by the Fair. Midway operations contribute \$4,101,750.00 to the CNE bottom line.

The midway is probably one of the most fluid attractions at the CNE in that it can be re-located and configured in many different ways. Any alternative location that is selected must possess the following features in order to accommodate a midway:

- Area must be relatively flat
- A hard surface is preferred to a grass area
- Plenty of underground service ports providing potable water, sanitary sewage and electricity are required
- Significant amount of electrical power must be in close proximity
- As the midway is such a significant draw it should be strategically located away from main gates beyond other building and attractions in order to draw people through those areas to the midway area and then force them back out of the grounds through these buildings and attractions. Therefore a location on the southern portion of the property is preferred.
- The midway should also be located in close proximity to Ontario Place so that it can capture traffic flow between the two parks.
- The requirement for space for the midway could probably be reduced 5 to 10% by relocating supply and service vehicles off the grounds. However, these would have to be located in an area where they were accessible which could impact off site parking revenues.
- Currently the CNE is unique in that it has two separate midway's Kiddie and Adult. These two midways work very well, however, they could be combined into one if required.

SHOPPING

Shopping is a very popular activity for visitors to the CNE, which has the largest number of commercial exhibits of any fair in Canada. Because of that popularity, we are able to attract approximately 700 retail exhibitors offering CNE visitors an opportunity to buy products from around the world. Each year, we generate over \$2,000,000 in rental revenue. Many of these exhibitors describe the CNE as the largest and most important event to the success of their businesses.

Many of the exhibitors in the International Pavilion come to Canada (and, in fact, North America) only once a year. They are a great attraction for many of the visitors to the fair, and, on the flip side, the amount of merchandise they are able to sell to our visitors make it attractive for them to participate.

People are attracted to the International Pavilion by products available from around the world. Over 50% of the exhibitors in the International pavilion come from outside of Canada and this is the only visit they will make to North America. The CNE offers a once a year opportunity to buy a fabulous array of products.

The Arts, Crafts and Hobbies Pavilion

Current Gross Revenue:	\$260,000
Current location:	Queen Elizabeth Building
Area Required:	65,000 square feet

At Home Pavilion / Shoppers Bazaar

Current Gross Revenue:	\$760,000
Current location:	NTC Hall A
Area Required:	130,000 square feet

The International Pavilion

Current Gross Revenue:	\$665,000
Current location:	NTC Hall B
Area Required:	110,000 square feet

Outdoor Retail

Current Gross Revenue: \$170,000
Current location: Princes' Boulevard south
Area Required: 15,000 square feet

SportsZone

Current Gross Revenue: \$140,000
Current location: Better Living Centre
Area Required: 30,000 square feet

Warehouse Outlet

Current Gross Revenue: \$150,000
Current location: NTC Hall C
Area Required: 58,000 square feet

SPECIAL ATTRACTIONS**Fireworks/Human Cannonball**

Current location: Waterfront, Princes' Boulevard
Current Cost: \$800,000
Area Required: 10,000 to 25,000 square feet

The CNE has traditionally had a special attraction or grand show through the grandstand or Inferno or fireworks. This activity helps drive the marketing for the fair and helps draw people onto the grounds. Fireworks have been a traditional special attraction and require access to the waterfront. Most other shows and spectacles would need enough space to create staging and seating for the public, and can range from between 10,000 square feet to approximately 25,000 square feet. The Skywalker was rated the number one show for 2 years.

Super Dogs

Current location: NTC
Current Cost: \$320,000
Area Required: 50,000 square feet
Requirements needed: Full theatrical lights/sound, stadium seating for 3,000 +

Our minimum requirements would be a facility which could house 3,000 seats. Optimally we would like to increase the number of seats as our audience grows.

ACTIVITIES OF THE CNE – SUMMARY CHART

Activity Name	Current Location	Area Required	Research Ranking % Visited	Research Ranking % Most Enjoyed*	Future Requirements / Notes
Farm, Food & Fun	Automotive Building	80,000 sq. ft	27%	31%	We are displaying a working farm; building must meet needs of Agricultural partners.
Garden Show	NTC	40,000 sq. ft	13%	31%	Adequate natural light and open space is required.
Horse Stables	Horse Palace	30,000 sq. ft	See Horse Show	See Horse Show	Horse stables are required.
Horse Show	Ricoh Coliseum	30,000 sq. ft	11%	37%	Ring area 100'x 200', seating for 1,000 +
Air Show	Waterfront	Current Staging	10%	60%	Full Waterfront setup for viewing required.
Baseball	Ball Park	Entire park	n/a	n/a	A Baseball park.
KidsScience	Centennial Square	10,000 sq. ft.	See Kids' World	See Kids' World	KidScience could use up to 30,000 sq/ft more space adjacent to Centennial Park. Must stay in the KidsWorld area.
Kids' World	Centennial Square	35,000 sq. ft	13%	43%	The current space in Centennial Park is the ideal size and location for this program.
SportZone	BLC	70,000 sq. ft	17%	29%	Indoor space of approximately the same size – 40,000 for programming and 30,000 for shopping and retail.
Outdoor Sports	NorthGrandstand, Ontario Drive, Lot H & D		n/a	n/a	
Bandshell Park	Bandshell Park	Entire park and seating areas	n/a	n/a	One of the few venues that allows for concerts and large gatherings. Along with seating, the park holds up to 10,000 people (3500-4000 seated). Ideal for mini-festivals and theme-days.
Parades	Dufferin Gates, Princes' Gates, full grounds		n/a	n/a	Parade lane needs to be wide enough to create parade and room for viewers and marshalling and dispersal areas

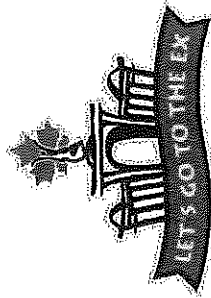
* (9 and 10 out of 10; scale: 1 meaning poor & 10 meaning excellent)

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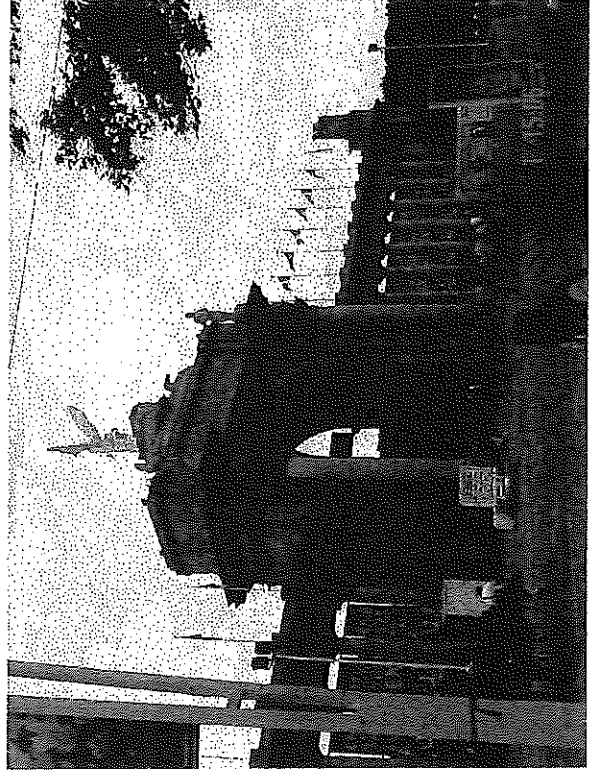
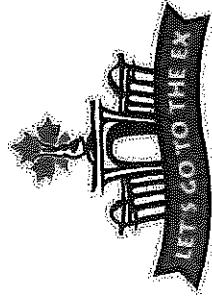
Activity Name	Current Location	Area Required	Research Ranking % Visited	Research Ranking % Most Enjoyed*	Future Requirements / Notes
Stages / Strolling Artists	Through-out the site		n/a	n/a	Very flexible in using any available space.
Remember When Pavilion	East Annex	30,000 sq. ft	9%	39%	Any indoor space with easy accessibility and approx. 30,000 sq.ft.
Food Building	151,000 sq.ft.		71%	38%	Fully serviced building with sufficient exhaust hoods for 100 exhibitors, sufficient space for 110 permanent booth structures, adequate space for seating and provides off season storage.
Midway	32 acres (1,270,000 sq.ft)		26%	42%	Fully serviced site with service ports for electrical, portable water and sanitary sewer, and approximately 32 acres of level space.
Arts Crafts & Hobbies	Q. Elizabeth Building	65,000 sq. ft	33%	26%	Indoor space of approx. equal size with access to services (electrical/plumbing)
At Home Pavilion	NTC – Hall A	130,000 sq. ft	n/a	n/a	Indoor space of approx. equal size with access to services (electrical/plumbing)
International Pavilion	NTC – Hall B	110,000 sq. ft	32%	40%	Indoor space of approx. equal size with access to services (electrical/plumbing)
Outdoor Retail	Princes' Blvd.	15,000 sq. ft	n/a	n/a	Outdoor space of approximately same size suitable for multiple tent installation with access to services (electrical/plumbing)
Warehouse Outlet	NTC – Hall C	58,000 sq. ft	n/a	n/a	Indoor space of approx. equal size with access to services (electrical/plumbing)
Fireworks	Waterfront		n/a	n/a	Need the open water to provide safe distant from the crowds.
Human Cannonball	Princes' Blvd.	10-25,000 sq. ft	New in 2005	New in 2005	
SuperDogs	NTC – Hall D	50,000 sq. ft	14%	74%	Indoor space - full theatrical lights/sound, stadium seating for 3,000 + (preferably larger for increasing audience sizes)

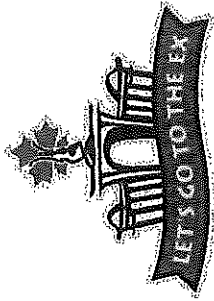
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Canadian National Exhibition

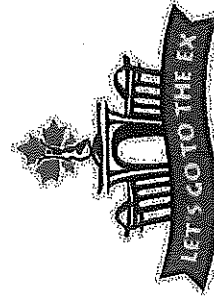


Role & Requirements

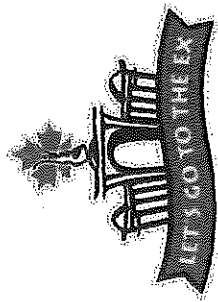




Introduction



- The CNE is the largest community celebration in Canada
- A grand history of countless “firsts” and remarkable achievements
- The CNE deserves proper recognition in all of the debates regarding its future;
 - including the City of Toronto’s desire to make “better use” of Exhibition Place; the general ambition to revitalize Toronto’s waterfront; and the proposed merger of Exhibition Place and Ontario Place.



Role



The CNE holds up a mirror to the community. As individuals and as a community, the CNE gives us a sense of where we have been, where we are, and where we may be going.



The unique value of the CNE is that it offers fun “hands-on” activities, entertainment, and education for all ages at a reasonable cost.

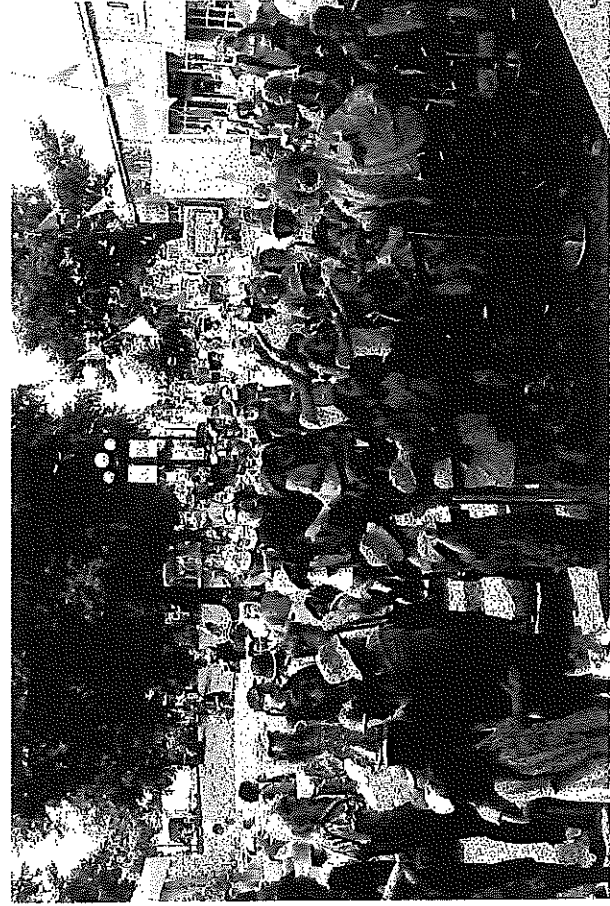


The "Case" for the CNE



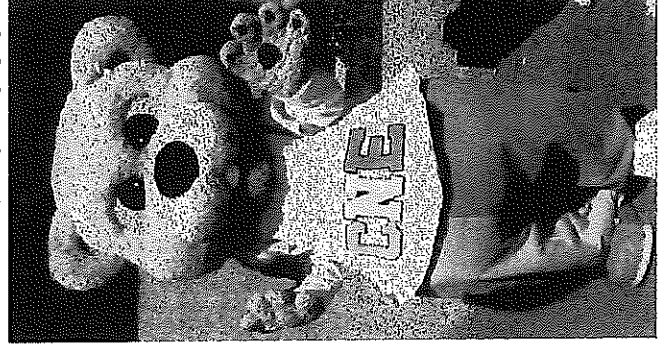
Activities of the CNE

- Agriculture, Air Show, Attractions, Entertainment, Food Building, Midway, Shopping, Special Attractions



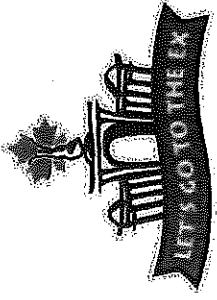
Social Benefits

- School Pass Program, Community Outreach, Volunteers, Accessibility, Green Advocacy, Child Awareness





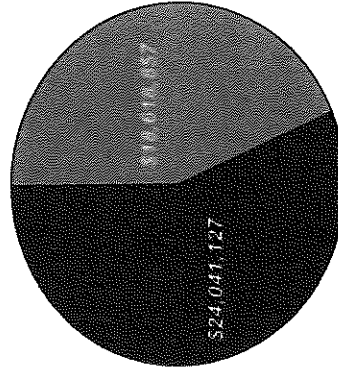
The "Case" cont'd



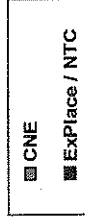
\$3,450,000

- annual support to Exhibition Place / NTC

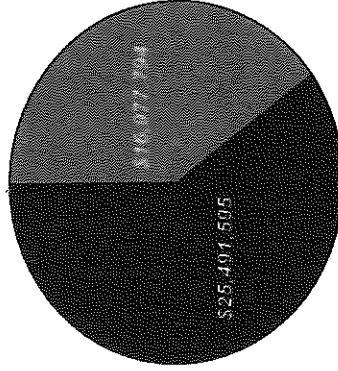
Revenues



2004 Actuals



Expenses



2004 CNE Net Income - \$1,641,063

2004 Consolidated (EP, NTC, CNE) Net Income - \$190,595



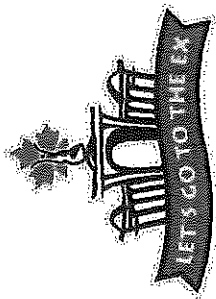
The "Case" cont'd



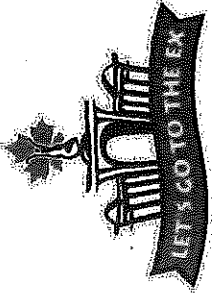
Contrary to the common misconception that the CNE is a burden to the taxpayer, the CNE is in fact a net contributor to both Exhibition Place and City of Toronto.

Annual Economic Impact

- \$15,000,000
- annual spending on employment at the CNE
- \$48,000,000
- direct spending to the Toronto economy
- \$25,400,000
- tax revenue for the 3 levels of government



Requirements



- Location



- Status

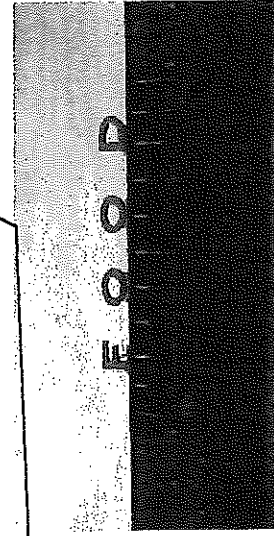
- Stature

- Largest fair in Canada
- 1.4 million attendees
- 18 days

- Safety

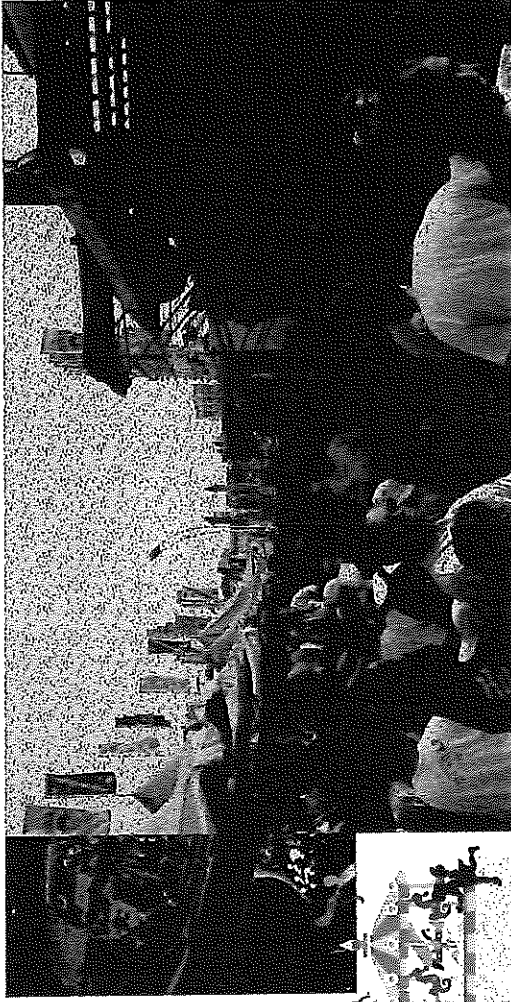
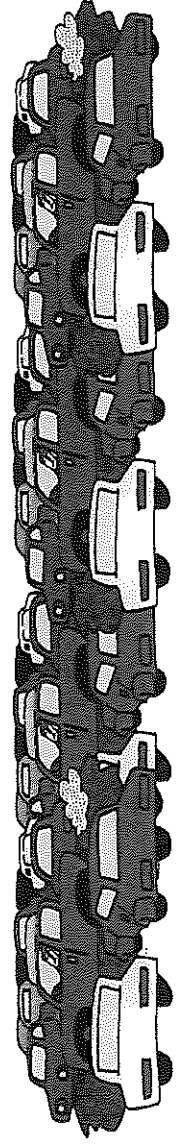
Up to 200,000 people per day

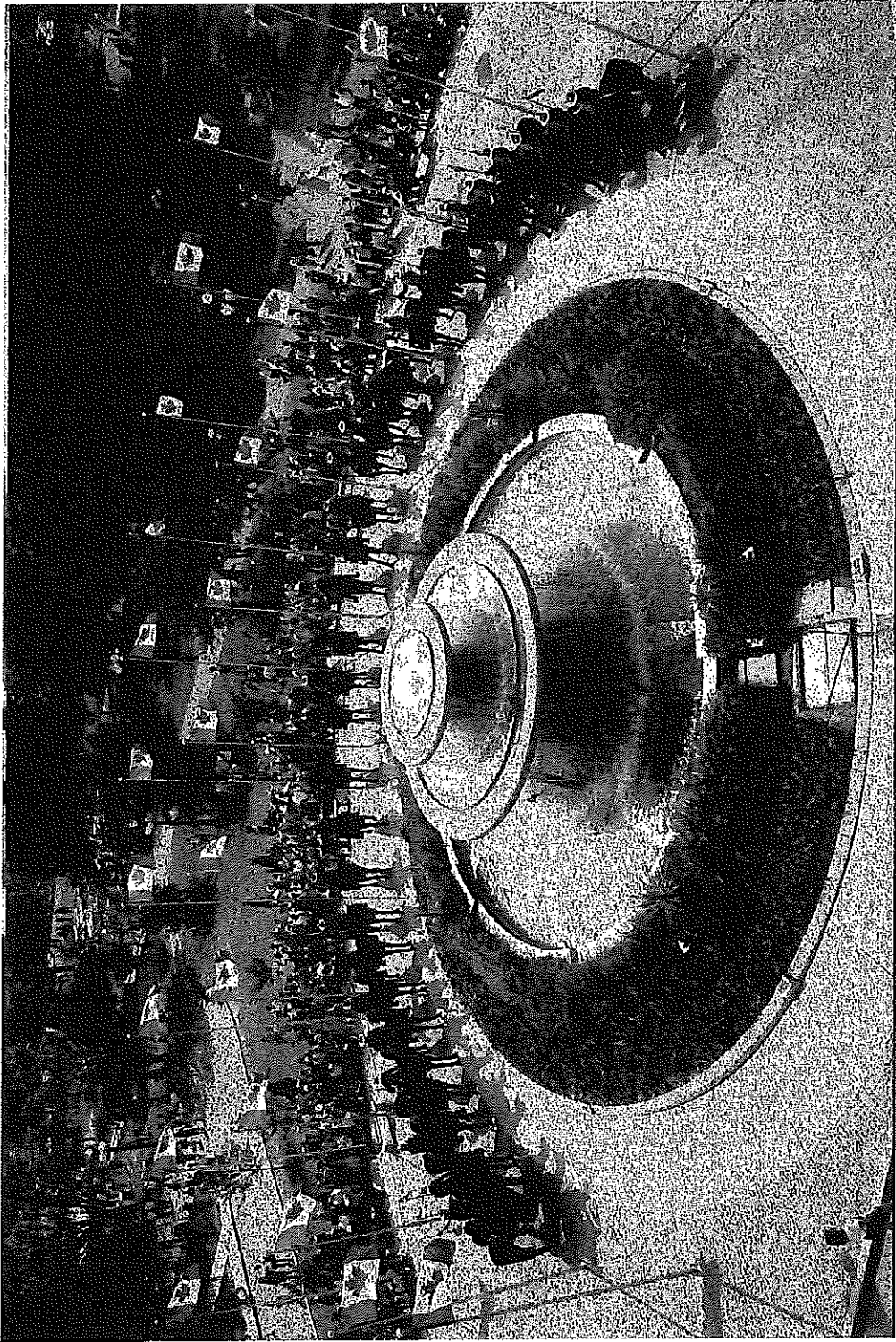
- Space / Size



- Food Building

- Parking





Square Footage Required for Annual CNE

