

A Multi-Purpose Sports Stadium: In-town versus Out of town location



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We do hope that this report can contribute towards the evidence base in determining optimum location for a multi-purpose sports stadium in Northern Ireland.

Glossary of Terms

BCC:	Belfast City Council
BMAP:	Belfast Metropolitan Area Plan
BMTP:	Belfast Metropolitan Transport Plan
DCAL:	Department of Culture, Arts and Leisure
DOE:	Department of the Environment
DRD:	Department for Regional Development
GAA:	Gaelic Athletic Association
GB	Great Britain
GIS	Geographical Information Systems
IFA:	Irish Football Association
IRFU:	Irish Rugby Football Union
MLA	Member of Legislative Assembly
NI	Northern Ireland
OFMDFM:	Office of the First and Deputy First Minister
PPSs:	Planning Policy Statements
RDS:	Regional Development Strategy for Northern Ireland
SIB:	Strategic Investment Board
UK	United Kingdom

Executive Summary

In January 2007, Belfast City Council commissioned a multi-disciplinary team from the University of Ulster to undertake an independent study to identify the optimum location of a multi-purpose sports stadium for Northern Ireland and to determine optimum capacity. This Executive Summary presents the key findings emerging from the research contained in the main report; makes recommendations and suggests a way forward for Belfast City Council.

1. Key Findings

The key findings are categorised under a number of headings indicated as follows:

Essential Stadium Characteristics

- **In-town location:** The research found overwhelming support for in-town sites as the most advantageous location for multi-purpose sports stadiums. The evidence stems from the worldwide body of knowledge and in addition, the vast majority of Northern Ireland stakeholders consulted expressed strong support for a city centre location. The research found limited support for an out-of-town location.
- **Size:** The research indicated that a stadium should be 'built to be filled and used frequently. On the basis of this, and taking account of likely users and the size of the Northern Ireland population, a stadium of between 20,000 - 30,000 would achieve the key determinants of atmosphere and user experience.
- **Financing:** The research suggested that the best funding model is a shared public-private sector partnership arrangement. In the context of Northern Ireland, a potential funding model would involve regional and/or local government acting in partnership to facilitate and support a private sector-led development scheme for a multi-purpose sports stadium in a preferred in-town location.
- **Best Practice:** The research also identified a global model of best practice in stadium development and operation, taking account of regeneration, economic and infrastructural perspectives, and not least the need for a sustainable business model which, broadly, balances sports events, concerts and conferences and exhibitions.
- **Multi Sports Use:** In addition, the research indicated that a major issue in running a multi-purpose sports stadium is the need for buy-in from one or more major sports organisations. This degree of buy-in is considered necessary for the sustainability of a scheme.

Global Best Practice

- The weight of opinion is in favour of an in-town location which is supported by the literature, expert/stakeholder opinion and comparative best practice at international and national level.
- A Global Model of Best Practice exists to assess the relative locations of multi purpose sports stadium based on key criteria which include:
 - Regeneration: all potential stadia locations should be evaluated with regards to their contribution to the need for regeneration.
 - Economic: the economic multiplier for city locations is around 2.5 as opposed to that for regional locations which can be as low as 1.4.
 - Infrastructure: all public facilities be they stadia or otherwise, must be serviced by appropriate infrastructure. Specifically in the case of stadia, the most important considerations relate to travel to and from the stadia and associated investment such as road networks, rail systems and the nodes required at the stadium to enable full use of the transport system.
 - Business/Marketing: the paramount consideration is that all the key business domains are integrated in a *holistic* multiplicity of interaction, in order to maximise the full marketing opportunity. This involves the interaction of retailing, tourism, hospitality industries along with the wider sports, leisure and cultural activities.
- In line with the wider body of knowledge from the national and international literature, the vast majority of the stakeholders concurred with the best practice model where multi-purpose sports stadiums are associated with this holistic multiplicity of facilities based on convenience to restaurants and bars, accommodation, entertainment, general retailing and other ancillary attractions such as tourist sites, art and culture venues.
- A key criterion governing optimum location concerns the spectator expectations when coming to a sports event. Within a stadium it is atmosphere and experience which are paramount, hence the 'build it to fill it' maxim. The quality of this experience can best be gained from the diversity offered by an in-town location and will be difficult to manufacture through on-site facilities in an out-of-town location.
- From a planning perspective a sports stadium proposed in an in-town location will have regard to the sustainability of the development and the infrastructure provision to support the proposed scheme. Consequently on planning grounds, an in-town development proposal for a multi-purpose sports stadium will consider the potential impacts on traffic generation and congestion; vitality and viability of the city centre; benefits derived in the public interest; evidence of the sequential approach; environmental quality and attractiveness of the urban form. Planning policy does stress the importance of an in-town location

for stadium development determined on its capacity to regenerate urban areas and to promote sustainability outcomes..

- There is a strong economic, cultural and social argument for a Belfast based stadium which will yield greater benefit for sports in Northern Ireland. The synergies offered by the in-town location including the pre and post game activities and the holistic city experience surrounding the sporting event will substantially outweigh those offered by a stadium sited in an out-of-town location. In this regard there is a perception that out-of-town stadiums are soulless places which invariably have inadequate infrastructure and service provision.
- The evidence base drawn from other cities such as Cardiff supports the view that benefits will accrue to the end users, sports fans and the community; and that multipliers will result for businesses including hotels, pubs and restaurants in the in-town location. In the US market the stadiums which moved out of the cities have faced major financial challenges as a result of reduced attendances and many are now moving back to city centre locations as a consequence.
- A key regeneration driver will be the ability to link and create connectivity between the outer city, city centre and the proposed site at Ormeau Park. The dynamic to create this synergy will be dependent in part in encouraging spectators to walk to the stadium from the various parts of the city. A stadium located in Belfast offers the capacity to act as an economic regenerator for the lower Ormeau area, the city region as a whole and contribute to the Northern Ireland economy.
- The Belfast option is much more tourist friendly with greater potential spend in hotels, restaurants, pubs and clubs, and more sponsorship and VIP opportunities. In terms of potential usage/patronage, support infrastructure, financial stability/viability, and private sector commitment, Ormeau Park is perceived to be an optimum location for a stadium.
- The case for the stadium in Belfast cannot be sold as a single speculative venture. Instead it needs to be carefully articulated into the business case for the city and sold as a key initiative to unlock the need for more imaginative and integrated decision making on the infrastructure commitment for the city. This way the stadium assumes a much more important strategic role to unlock inertia, create critical mass, lever infrastructure investment, benefit the public interest and generate social and economic spin off for the city.
- An in-town location for the stadium will provide additional synergy in creating 'Destination Belfast'. The branding of Belfast as a tourism-leisure-sporting destination will bring enormous economic benefits and generate the multiplier effects. Investment in product including infrastructure will generate greater capital return if targeted to Belfast. Consequently a Belfast based stadium is seen to offer the potential of delivering greater benefits/returns.

- Successful stadiums are those that engage the local communities in a full and frequent capacity.
- Rugby, soccer and GAA supporters expressed diverging views on the location of a stadium. Rugby and soccer fans overwhelmingly backed a city centre location but opinion was evenly divided among GAA supporters. There was further disagreement on the size of the sports stadium with GAA supporters preferring a 40,000+ seater stadium and rugby and soccer supporters opting for a smaller venue.

The Business Model

A successful multi-purpose sports stadium based on comparable examples of stadiums in mainland UK is dependent on a number of key attributes which requires

- More than one tenant: A majority of stadiums require more than one major sports tenant in order to establish a more balanced revenue structure.
- A 'balance' of revenue streams: Although in practice there is a range of revenue models depending on sports stadiums, operators tend to strive to achieve a balance of revenues.
- Size is an issue for revenue frequency: Larger stadiums tend to host relatively fewer sporting events whereas smaller stadia tend to rely more heavily on more frequent sporting usage; this reflects relative economies of scale.
- Flexible use of the playing surface: Many stadium operators also host concerts though these tend to be relatively infrequent due to concerns about protecting the playing surface.
- Conferences and Exhibitions are an important growth area: Most stadiums compete for conference and exhibition business due to the potential to generate larger revenues and commissions. An important stimulator for maximizing conferences and exhibitions is a stadium with a roof, allowing all weather use.
- Ancillary revenues are important additional revenue streams: The growth in ancillary revenues to stadia operators reflects a diversity of marketing strategies and local circumstances.

In-Town: Spatial Analysis Perspective

- Belfast is the ideal location in Northern Ireland taking into consideration key infrastructural elements required for a new stadium. This includes the existing presence of transport, entertainment, and health and safety infrastructure all in close proximity to the city centre.

- Belfast is at the hub of regional public and private transport networks. This unique strategic position consequently facilitates access into the region from key national and international locations and, once in Northern Ireland, enables ease of movement to entertainment and other tourist venues.
- Belfast has the transport and entertainment infrastructure necessary to attract and hold visitors attending events at a new stadium. In turn this could generate significant economic development benefits for the city and spinout across the Northern Ireland region.

Out-of-town Maze/Long Kesh Perspective.

- The key criteria governing site selection is based on providing a multi sports facility that meets the Government's vision for 'A Shared Future' for Northern Ireland which includes the needs of the three sports codes (GAA, IFA and IRFU) and is endorsed by the main political parties. On this basis the Maze/Long Kesh site provides a viable location and development opportunity which has been determined against a number of defining criteria including operational viability; corporate governance involving the setting up of a stadium company linked to an operating company, naming rights, and private sector partners who will absorb a substantial portion of the development risk.
- However the evidence base indicates that the Maze/Long Kesh proposal is flawed and based on a case of having a site which is looking for a use whereas the rational approach would be to determine the use characteristics of the proposed development and identify the best site to suit the determining criteria. Subsequent lack of transparency has critically undermined the credibility of and support for the Maze/Long Kesh proposal.
- On value for money grounds most of the stakeholders find it very difficult to justify the government's decision to finance a stadium at Maze/Long Kesh given the pressing financial priorities for other essential public sector services such as health and education. The fact that other private sector-led proposals are on the table to develop a stadium in a Belfast location makes the government's position on the proposed Maze/Long Kesh development more difficult to justify in the public interest.
- The implication for the Maze/Long Kesh site is that developers will be expected to finance all of the infrastructure costs including improving access to develop sustainable modes of travel. Clearly the cost associated with providing infrastructure in locations which are away from town centres and major interchanges are more daunting compared to development in more central locations.
- The sustainability of an out-of-town stadium at the Maze/Long Kesh site is a key issue with many concerned that another Millennium Dome could result whereby financial realities are distorted by political intent.

2. Recommendations

Based on the key findings emerging from this research a number of recommendations are suggested as follows:

- A new multi-purpose sports stadium should be embraced as a significant and valuable asset to the Northern Ireland economy and should be promoted as a catalyst for large-scale investment in infrastructure, tourism and cultural development.
- The determination of optimum location for a multi-purpose sports stadium should be based on the best practice model of holistic multiplicity which incorporates the totality of the experience, atmosphere, and facilities offered by the in-town location.
- The location of the stadium must ensure that it is accessible and attractive to the widest possible sporting and cultural audience.
- Government must ensure that the associated infrastructure is capable of supporting a multi-purpose sport stadium project of this scale.
- The final decision on location should be based on a pragmatic and objective strategic, regeneration, economic, infrastructure and business analysis; and should not be based on political considerations.
- Before a final decision is taken, the new Northern Ireland Assembly should ensure that the widest possible consultation is undertaken including transparency on a detailed analysis of the advantages and disadvantages of the in-town versus out-of-town locations and the reasons for selecting the chosen location.

3. The Way Forward

Reflecting on the above recommendations Belfast City Council should consider the following options. Option 1 is the preferred option but it is dependent on resolving a number of challenging issues. If these issues prove irreconcilable then option 2 should be considered.

Option 1: Multi-purpose sports stadium in an in-town location at Ormeau Park

Chapter 6 provides details of the three proposals put forward by Durnien.com City of Belfast Stadium Limited, Sheridan Millennium Limited and Kajima Urban Developments. The summary of these development proposals indicates the advantages and opportunities associated with potential delivery of a multi-purpose sports stadium 'in-town' at Ormeau Park.

The delivery of a sports stadium at Ormeau Park may be achievable in the medium term if the following issues were to be addressed:-

- Developers secure the long term support of and legally binding agreements with one or more of the sporting bodies (IFA, IRFU and/or GAA) for the project.
- The proposed stadium development gains and maintains support of key stakeholders and local residents on the Ormeau Road, Ravenhill Road and surrounding areas.
- The preparation (following agreement with key stakeholders) of a detailed design brief to meet user requirements for issue to potential developers.
- A decision is made by Belfast City Council on the future use of the Maysfield site and clear direction is given as to its availability for developers to use for 'associated commercial development' to financially support the construction and operation of the stadium development at Ormeau Park
- The identification of an appropriate delivery mechanism (joint venture, appointment of a single developer, formation of a development company, etc) and consideration of an appropriate mix of public and private sector funding for development of a stadium
- Where deemed appropriate, the submission of a detailed Business Plan by each of the developers confirming construction development costs with sources of funding, stadium usage, and operational costs with sources of income.
- Where necessary, a commitment by Belfast City Council (or the public sector) to contribute funding to support the construction and/or operation of the stadium element of the project.
- A resolution of issues necessary for obtaining planning approval for the project (planning policies/statements, transport infrastructure, loss of amenity space, design quality, sustainable development, etc).
- Where necessary, commitment by Belfast City Council (or the public sector) to contribute funding to support the provision of footbridges/walkways/bridges across the River Lagan as part of appropriate transport infrastructure for a stadium development.
- A resolution of issues surrounding the positioning of a stadium within Ormeau Park and the potential requirement to seek agreement with the Department of Regional Development (DRD) and its advisors to re-route sewers and relocate shafts being constructed as part of the Belfast Sewer Project.

Option 2: Multi-purpose sports stadium on an in-town site based on holistic multiplicity criteria

Option 1 presents the issues that need to be addressed if Ormeau Park is progressed as the site for an in-town multi-purpose sports stadium. The findings of this report highlight the urgent need for a reassessment of the Maze/long Kesh development proposals. The weight of evidence clearly indicates that an in-town location is the most sustainable for a multi-purpose stadium to serve the needs of Northern Ireland. Under Option 2 this presents the opportunity for Belfast City Council to engage and develop a partnership with DCAL and SIB to progress a multi-purpose stadium together in Belfast for the benefit of the Province. This will involve considering alternative in-town sites. The term 'consider' is used purposefully here rather than 'reconsider', because the research team are not convinced that all alternative sites have been examined in sufficient detail. This would appear to be particularly so in relation to potential site considerations in the wider Titanic Quarter/Portlands area, the North Foreshore or at Maysfield.

Option 2 would involve a longer term timeframe but offers the advantages of undertaking a transparent site selection evaluation exercise which considers viability based on holistic multiplicity criteria rather than being constrained by the Shared Future agenda.

All of the bullet points in option 1, (with the exception of the final 2 bullet points) can be considered as applying to any in-town site under option 2.

1.0 Introduction to the Research

1.1 Contextual Background

An inter-disciplinary team from the School of the Built Environment, School of Economics and Politics, and School of Marketing, Entrepreneurship and Strategy in the University of Ulster has undertaken this commission on behalf of Belfast City Council. The research considers the impact of a multi-purpose sports stadium with regard to Northern Ireland.

In 2002 a number of former security sites were transferred to the Northern Ireland Executive by the Government. The Strategic Investment Board (SIB) was asked to work with the OFMDFM and other strategic partners outside government to explore the potential for regenerating the largest of the sites, Maze/Long Kesh. The site offered the potential to transform the symbols of past division to icons of a Shared Future. The Government saw the potential to explore an exciting multi-faceted development on the 360 acre site. One of the most significant proposals for the site was a multi-sports stadium which it was suggested had the potential to bring together gaelic sports, soccer and rugby in one world class 21st Century Shared Future facility which would put Northern Ireland on the map for hosting major international sporting, musical and other high profile events. The Government stated that the proposed construction of a new multi-sports stadium at the Maze/Long Kesh represented the opportunity to bring together the three sporting bodies, the IFA, GAA and IRFU and to secure the long term viability of the project.

Proposals to construct a mixed use development including a multi-sports stadium at the Maze/Long Kesh are still being advanced by SIB/DCAL. However there are major concerns being voiced in various circles concerning the appropriateness of an out-of-town location for the development of a multi-purpose sports stadium. Consequently the case for locating a stadium in an in-town location needs to be more fully investigated and considered within the decision making process to determine the optimum location.

Specifically Belfast City Council supports the provision of a multi-purpose sports stadium in Belfast. The council takes the view that the location of a major multi-purpose sports stadium for Northern Ireland is best located within the region's capital city. In 2004 Belfast City Council responded to a public advertisement placed by SIB inviting landowners to submit details of suitable sites for a multi sports stadium. Belfast City Council proposed sites at Musgrave Park, the North Foreshore, Ormeau Park, and Sydenham (Thomas Patton Memorial Park, Blanchflower Stadium and Tillysburn). The subsequent evaluation of all sites by Government determined that the ex-Maze Prison site possessed more deliverability requirements than all other sites.

In 2005 private sector developers put forward preliminary proposals to Belfast City Council to develop a multi-purpose sports stadium in Belfast. In June 2006 Belfast City Council issued a Development Brief for the development of a Multi-Purpose Sports Stadium in Belfast at Maysfield, the North Foreshore and/or Ormeau Park.

Three developers have made detailed submissions to support their development proposals to Belfast City Council and indicated that Ormeau Park would be a preferred location for the development. The receipt of three bids provides an indication that private sector development companies recognise the potential of this development. The expectation is that the debate regarding the location and provision of a stadium will continue to gather further momentum and will ultimately be a contentious issue for consideration by the new Assembly.

1.2 Terms of Reference

In January 2007 Belfast City Council appointed an independent, inter-disciplinary research team from the University of Ulster to identify the optimum location of a multi-purpose sports stadium for Northern Ireland and to determine the optimum capacity. Specifically the research addressed the following key issues:

- the optimum regeneration impact
- the maximum economic impact
- the optimum infrastructure impact
- the maximum business impact
- the optimum capacity and use

The research tasks identified in the terms of reference include the following:

1. To derive from the worldwide body of knowledge relevant information identifying the essential and desirable criteria for the development of a successful multi-purpose sports stadium in terms of optimum location.
2. To examine recently submitted multi-purpose sports stadium development proposals for Belfast.
3. To undertake an extensive consultation exercise with key stakeholders in the public sector, the private sector and the community sector in Northern Ireland.
4. To identify best practice based on other relevant stadium developments in the UK.
5. To examine all available information applicable to the out-of-town stadium proposals outlined within the Maze/Long Kesh Master Plan; and to assess the comparative position of the Maze/Long Kesh proposal against the in-town analysis.

1.3 Research Methodology

This report is the result of an independent academic study. The authors of this report are professionally bound by strict standards of objectivity, rigour and validity of research methodology. These standards provide the foundation of credibility by which academic research is judged.

The objective of the research design is to create Global Best Practice depicting the criteria required to determine the optimum location of a multi-purpose sports

stadium. This Global Best Practice model is derived, first and foremost, from the worldwide body of knowledge literature. Having established the best practice model, the research design is then empirically tested with key stakeholders in Northern Ireland. Consideration of the key similarities and variances are of central importance to the research.

The research design consisted of three strands as follows:

Strand 1 involved a literature search and review. This entailed a consideration of international/national stadia including the economic impact on city centres and the benchmarking of key performance indicators. This strand focused on the criteria necessary for the successful development of a multi-purpose sports stadium by reference to similar development types elsewhere in United Kingdom and the wider world.

Strand 2 involved a representative cross-section of consultations, including structured discussion, focus groups and attitudinal surveys, with the key stakeholders in the public sector, the private sector and the community sector (Appendix 1). Discussions were conducted with each of the major sport bodies in Northern Ireland (GAA, IFA, IRFU); and representative supporters groups. Attitudinal surveys were conducted, in collaboration with the supporter groups affiliated to the major sports bodies and in exit surveys outside grounds during/after games.

Strand 3 consisted of a series of discussions with key stakeholders of selected case studies where stadia have been located in city centre and out-of-town locations (Appendix 1). In this regard the evaluation studies conducted into the Millennium Stadium in Cardiff provides a potential best case example in assessing the economic impact of the development on the city centre. Other case examples included are the Huddersfield, Hull KC, the Reebok in Bolton and the new Doncaster stadium.

Strand 4 consisted of a spatial analysis. A series of maps were generated using geographic information systems (GIS) software as a tool for spatial analysis. Firstly, comparison was made between the wider Belfast City Centre area and the Maze/Long Kesh site and, secondly, differentiation of specific locations within Belfast City Centre.

1.4 Definition of a multi-purpose sports stadium

It is important to clarify at the outset what the definition, purpose and function of a multi-purpose sports stadium entails and more specifically the relationship to the Shared Future agenda which has clear connotations within Northern Ireland.

In terms of this report a clear understanding of the definition of '*a multi-purpose sports stadium*' is therefore critical and at the heart of identifying and understanding the range and diversity of proposals which currently exist within the Northern Ireland context.

The evidence from this research indicates that '*multi-purpose*' refers to more than one activity, that is, a stadium may have a sporting use but also an entertainment use in the form of concerts, shows and exhibitions. '*Sports*' is deemed to mean more

than one sport and '*stadium*' describes a facility which provides the capacity to accommodate users and spectators of one, or more than one, sport inclusive of other recreational and entertainment activities.

It is important to stress that this does not mean a 'national' stadium or a 'national stadium to accommodate three sports' or a stadium used by three sporting bodies representing or demonstrating shared values or a shared future. In this context, the Government's vision for 'A Shared Future for Northern Ireland' is based on a peaceful, inclusive, prosperous, stable and fair society founded on the need for reconciliation, tolerance, and mutual trust for all (OFMDFM, 2005). In meeting this vision major developments promoted by government which have a community impact will potentially fall within the ambit of the Shared Future whereas private sector-led developments are not necessarily bound by this agenda.

2.0 Multi-Purpose Sports Stadiums: Global Best Practice

2.1 Introduction

The purpose of this Chapter is to identify the criteria which influence and determine the optimum location for multi purpose sports stadiums. Drawing on worldwide literature and cases, this chapter aims to define a **Global Best Practice Model** of the holistic multiplicity underpinning a successful stadium.

Resulting from the research in this context, the chapter sections represent the key criteria surrounding the optimum location of a multi purpose sports stadium with appropriate seminal reference for the reader who needs confirmation of the principles and characteristics of each.

2.2 Planning Optimum Location

The property market's mantra of 'location, location, location' signifies the importance of geographical space and positioning on economic value and anticipated returns (Ball et al, 1998). Literature evidence suggests that the optimum location depends on the sites' relative benefits. The relative attractiveness of a particular location can be interpreted by key criteria which include strategic positioning at the core of a large metropolitan area to meet the demand-supply requirements of the locality, contributing to agglomeration economies, providing economies of scale, complementing a good infrastructure network to service the location and its hinterland, offering prestige value, capitalising on the supporting infrastructure, and mitigating externality effects (Ball et al, 1998; Harvey, 2004). In real estate terms the location of a plot of land is a key determinant of its demand and market price including its proximity to other activities. The configuration of land uses in the market place are determined by the decision of market players expressing preferences based on a desire to find optimum location that, subject to planning and other prevailing constraints, maximises utilities, profits or market share (Oxley, 2004). Ball et al stress that although the locational criteria of different land use types will vary, the utility value to the user is a function of both land and building characteristics and locational advantage.

2.3 In-town v Out-of town Developments

There is a considerable literature base available on stadium location, (Thornley 2002; Nelson 2001; Newsome and Croner 2000). Most of this literature is concerned with city centre or urban locations. The merits of city centre stadia in the UK are best illustrated by Cardiff's Millennium Stadium, (Elder 2004) and more recently Hull's KC Stadium (Davis Langdon, 2004).

In the 1980s and early 1990s there was a trend to build new sports stadium in out-of-town locations. However, since the late 1990s this trend is reversed, both in terms of out-of-town sports franchises returning to city centre locations and new ventures being created in-town. That literature which addresses out of town locations, tends to cite the negative dimensions of such locations. The most famous example cited is Waverly Park in Melbourne, Australia. This stadium was built in 1969/70, with a first

construction stage capacity of 78000. The first game attracted 25887 spectators. Further, development never took place. The stadium closed in 2000 with the Australian Football League giving a number of reasons.

“While it was serviced by a major freeway, Waverley Park was too far from Melbourne City Business Centre and lacked sufficient public transport and parking. As it aged, its limitations also became increasingly apparent. The ground itself was very large and spectators felt distant from the game”
(Wikipedia.org/wiki/Waverley_Park)

The ground’s best purpose was to serve, *“..as a critical bargaining chip..”* in negotiations with Melbourne Cricket Ground (situated in Central Melbourne), over access.

A more recent illustration is the disappointing legacy of the Sydney Olympic Stadium, where even as a reduced sized stadium it fails to attract regular events and remains isolated because of its location. According to Chris Hartcher, an opposition politician in the New South Wales legislative assembly, *“It is now clear that the post-Olympic plan was largely rhetoric. The huge capital investment in the Olympics will leave state finances haemorrhaging for years to come”*. (Daily Mail 16th March 2007, ‘In Athens: the bill is still rising).

The debate about the cost of the 2004 Olympic Games in Athens cites a similar example of over-build. Serafic Kotrotsos, Head of Communications for the 2004 Organising Committee, said, *“It’s like we built a brand new house, held a party, then closed it and now we have no guests”* (Daily Mail 16th March 2007, ‘In Athens: the bill is still rising).

Most recently, commenting on the disappointing crowds watching the ICC Cricket World Cup in the Caribbean March/April 2007, Mike Atherton crafted an article, entitled: ‘Out-of-Town stadiums dilute the party spirit’, (Daily Telegraph April 1 2007 P. s7). In Atherton’s words:

“One of the reasons for the poor attendances,.... has been the location of some of the new stadiums. Traditionally, watching cricket in the Caribbean has been an urban experience. The five main cricketing centres until the end of the 1990s were Trinidad, Antigua, Barbados, Jamaica and Guyana. In each, the Test match ground was in a downtown area; in other words completely accessible for the man in the street. That mould was broken by St Lucia, who, built a modern facility out in the Beausejour foothill... That ground became the template for the new stadiums that have been built for this World Cup....

This week’s Super Eight matches were played in brand new stadiums in Guyana and Antigua, both of which have followed the St Lucia example. Both, it must be said, are perfectly pleasant grounds but both are situated out of their respective capital cities. The Guyana National Stadium was built on a Greenfield site some 25 minutes out of town; the Vivian Richards Stadium in Antigua is completely remote, resulting in spectators having to tramp through the bush for a kilometre or two after parking their cars.

There is a disturbing analogy here with American baseball. In the 1960s and 1970s many of the old neighbourhood ballparks, grounds that embraced their surroundings and therefore were embraced by surrounding them, were knocked down and replaced by so called 'cookie-cutter' stadiums. These concrete behemoths were built out in the 'burbs', and rather than catering solely for baseball they were built as multi-purpose stadiums in which you were likely to listen to a Billy Graham peroration as watch a local baseball team. These stadiums all looked alike ... and, for the most part, the needs of the spectator came last on the list of priorities.

Unsurprisingly, most of these cookie-cutter stadiums failed to win the hearts and minds of the sports fans. Most have now been imploded and replaced by retro-style ballparks, for the most part in downtown locations" (Mike Atherton's, Daily Telegraph April 1 2007).

In a few brief paragraphs Atherton encapsulates the core thrust of the arguments contained in the body of knowledge over many years. Whilst there are numerous local media articles debating in-town/out of town location of stadiums (Hoey March 2003, McDonnell April 2007, Gracey April 2007 and others, (Appendix 2) there is overwhelming evidence from world wide literature in favour of in-town venues.

2.4 Regeneration Perspectives

Exploring the relationship between stadia and regeneration involves consideration of several issues. The UK has adopted a property-based regeneration approach which focuses upon property and physical development as the backbone for economic regeneration as noted by Deakin and Edwards (1993). Newsome and Comer (2000) observed that in the US there has been resurgence in city centre locations for stadia development due to, as they describe it, 'downtown revitalisation'. In-town locations have become more attractive and it has been suggested that, even though land is more expensive in cities, in-town stadia create more positive impacts than other locations.

In the US the current imperative to regenerate city centres provides both opportunity and motivation to drive in-town stadia development due to land values being at acceptable levels and the political will being in place to support such proposals. The urban decay that a century ago contributed to the move of stadia out-of-town is now a significant factor in locating stadia in-town principally as a result of the availability of under-utilised land. In-town land values still tend to be higher than those for out-of-town locations, but the regeneration benefits make it effective to pay a premium for city centre locations.

Recently a number of cities in the UK have placed focus on the ability of sports stadia to stimulate economic development and regeneration according to Jones (2001). The development of a stadium creates benefits for property developers, stadium operators and the wider community alike, largely in the form of employment growth. Jones also identifies tourism and leisure as being a new engine for economic growth and describes them as the new 'sunrise' industries.

This perspective is endorsed by Thornley (2002) who observes that stadia are part of the infrastructure needed for a city to expand its economic activity into new and

vibrant sectors such as leisure. Stadia sometimes become tourist attractions in their own right, for example, the Nou Camp Stadium in Barcelona is one of the city's top tourist destinations. Thornley further postulates that stadia developments should not be regarded as isolated projects but integrated into broader visions of local regeneration and strategic policy, over issues such as social inclusion, sustainability and public transport.

Chapin (1998) agrees that regeneration ambitions are a valid consideration when choosing the site for new stadia. However, he postulates that the key factor is maximising overall economic return and that it is consequently necessary to take into account existing and future land uses in the stadium locale and that a decision dominated by political concern is almost certainly doomed to be sub-optimum. The fact that cities have been seeking to revitalise through the development of entertainment, conferencing and shopping facilities is stated by Nelson (2001) and he asserts that the use of sport stadia as a form of economic regeneration stimuli is an extension of this theme and is equally valid.

From the above discussion it would appear that while there are no socio-economic laws which compel consideration of the use of stadia as a tool for regeneration, potential locations should be evaluated in the light of their contribution to the need for regeneration.

2.5 Economic Perspectives

Beyond the regeneration debate is the issue of which site would deliver maximum positive economic impact. If a regeneration-led approach is adopted this would require that areas worthy of regeneration be identified and that a location decision be made based on a combination of need and potential outcome. From a regional perspective, however, it is arguable that the outcome dimension should be afforded greater weight than that of need.

Beade and Dye (1990) have demonstrated that in-town facilities and the opportunity they give consumers to buy from localised outlets such as bars and restaurants, generally produce greater economic impact than their out-of-town rivals. Most studies of the economic impact of stadia note the role played by proximity to hotels, restaurants and convention facilities. Many cite "*pedestrian-friendly environments*" as contributors to greater economic impact of stadium locations.

Hudson (2001) has examined a range of economic impact studies relating to stadia developments and has found that the economic multiplier for city locations is around 2.5 as opposed to that for regional locations which can be as low as 1.4.

2.6 Infrastructure Perspectives

All public facilities be they stadia or otherwise, must be serviced by appropriate infrastructure. In the case of stadia, the most important considerations relate to travel to and from the stadia and associated investment such as road networks, rail systems and the nodes required at the stadium to enable full use of the transport system.

Where such infrastructure does not currently exist, a holistic approach would require that investment in new infrastructure be evaluated together with any planned spend on a new stadium. This evaluation approach has contributed to the trend in the US away from out-of-town locations for sport stadia to the benefit of in-town solutions. Costs, including total infrastructure costs, have been central to in-town locations being the currently favoured solution.

Chapin (1998), when evaluating the key criteria for selecting a stadium location, asserts that an out of town development with a requirement to create transport links and develop parking solutions at the stadium will almost always be inferior to an in-town solution with these amenities already in place.

Beade and Dye (1990) also identified pedestrian accessibility as a key success factor and it is worthy of note that out-of-town facilities almost never provide this type of access. Their reasoning focuses on the benefits accruing from increased consumption by event visitors in amenities local to the stadium such as hotels, restaurants and bars, generated by on-foot consumers.

In his research into football stadium locations in the Netherlands, Van Dam (2000) identifies new demands for the 21st Century which include accessibility for fans. This requirement also emphasises the centrality of the infrastructure debate in selecting a site for a new stadium.

Jones (2001) discusses the role attracting 'hallmark' events such as the hosting of major sporting tournaments, for example the Rugby World Cup in justifying and sustaining modern stadia. The quality of infrastructure and linkages is central to a successful bid for large events and consequently selecting a site based on the availability or creation of excellent infrastructure is of great importance. In the same piece of work, Jones reflects on the emphasis and success of infrastructure-led development since the early 1980s and the impact that Urban Development Corporations have had on the urban landscape and comments on the impact that appropriate infrastructure investment has on development success.

Thornley (2002) expands this construct by suggesting that stadiums themselves are a form of infrastructure led development and are a key element in a city or region's toolkit. He also emphasises the point that there are very significant advantages of locating a stadium on a site where use can be made of existing public transport. He balances his argument by identifying the fact that in some instances an out-of-town solution may be attractive if it would cause less traffic disruption and congestion than an alternative in-town location. Thornley is one of the few authors who introduce overarching environmental considerations relating to the increased travel usually associated with out-of-town stadia.

Infrastructure investment associated with a new stadium also has the propensity to result in other developments in the locale of the stadium. This argument may be considered neutral in respect to a location decision, but Nelson (2001) postulates that out-of-town facilities generally require much more parking allocation than in-town facilities and that such parking discourages localised investment near the new stadium.

This consideration is based on the economic theory of opportunity cost which is defined as the cost of a good in terms of another opportunity forgone (and the benefits which could be received from that opportunity). Assessing opportunity costs is fundamental to assessing the true cost of any course of action. This issue is addressed in further detail in Chapter 7 section 5.

2.7 Business Perspectives

The business aspects of any stadium development are not only complex but also essential to any successful stadium. Marketing publicity alone cannot make a success of a stadium. The key business issues are core and peripheral target markets and core and peripheral products, which are captured by the key marketing domains outlined below. The paramount consideration is that all the key business domains are integrated in a *holistic* multiplicity of interaction, in order to maximise the full market opportunity. The theoretical construct of *Servicescape* (Bitner 1992), serves to support this holistic mix dimension. Not only does it acknowledge the importance of such a holistic multiplicity but it takes account of the whole physical landscape for services and emphasises the importance of atmosphere and ambience for service delivery. Sub-sections 2.7.1 – 2.7.5 represent the holistic multiplicity of factors which must interact in order to achieve the total experience of a major sports or leisure event.

Drawing on *Servicescape* constructs, the foundation marketing literatures are services marketing; retail marketing; tourism marketing; hospitality marketing; and sports and leisure marketing. These fundamentals are outlined below.

2.7.1 Services Marketing principles/characteristics of services (Parasuraman et al 1985, Gronroos 1984), such as the heterogeneity, perishability, tangible and intangible, all apply to and impact upon the marketing of sports stadia. All of these characteristics together are manifest in the experience and atmosphere created by and surrounding a stadium based event, both within and without the stadium.

2.7.2 Retail Service Marketing principles/characteristics (Judd 1968) are closely aligned to services characteristics. In such a service as provided by a sports stadium the retail fundamental of location is paramount. A sports stadium is in effect a retail construct in that customers make their way to the retail outlet, the stadium to experience and consume the service provided, namely the event in the stadium. An additional dimension of retailing is that consumers expect multiple variety of things to see, browse over, experience, purchase and use, and to have all this in convenient proximity. It is no accident that retailers cluster their businesses together as a concentrated magnet of enticement. A sports stadium therefore is one large and specific component of a services retailing experience.

2.7.3 Tourism Marketing principles/characteristics (Palmer 2001, Nash 1992, Jefferson and Lickorish 1988) are those of services marketing and retailing, but from the perspective of the tourist. Novelty and newness of the prevailing culture, atmosphere and products/services need to be available. A sports stadium will serve to be either the primary or secondary reason for a tourist visit. However, it is a given that tourists will avail of a much wider variety of service experiences whilst taking in a sports stadium event. These experiences, in addition to the stadium event and

retailing in the general sense will incorporate historic, cultural and artistic depictions of the local area.

2.7.4 Hospitality Marketing principles/characteristics (Teare and Calver 1996) are shaped by accommodation and catering. A meaningful tourist centre will require a multiplicity of both accommodation and catering across the full spectrum of quality and variety. So, guest houses to hotels in various quality and food, from snacks to à la carte in various quality.

2.7.5 Sports and Leisure principles/characteristics are the specialist marketing techniques and activities employed to maximise the stadium experience and revenue spend. Such activities are enhanced by exploiting the full spectrum of marketing opportunities offered by all of the above marketing domains.

2.8 Summary

Key findings from this chapter are based on the worldwide body of knowledge in terms of seminal literature surrounding multi purpose sports stadiums. As always with such a wide scope of topic, there are similarities and variances as to optimum location. However, the overwhelming evidence is in favour of such venues being sited in in-town locations. The key criteria which determine location are strong. This section has addressed these strong criteria and shown how they must be taken into account when deciding stadium location. These criteria are presented pictorially as a Global Model of Best Practice that underpins a successful stadium (Figure 1).



This model was used to inform the empirical research with stakeholders in Northern Ireland. It was also used to assess the relative locations of multi purpose sports stadium case examples in mainland UK.

An important finding from this chapter is that there is indeed a **Global Model of Best Practice**. The key criteria within this model influencing stadium location are:

- **Regeneration** – All potential stadia locations should be evaluated with regards to their contribution to the need for regeneration.
- **Economic** - The economic multiplier for city locations is around 2.5 as opposed to that for regional locations which can be as low as 1.4.

- **Infrastructure** - All public facilities be they stadia or otherwise, must be serviced by appropriate infrastructure. In the case of stadia, the most important considerations relate to travel to and from the stadia and associated investment such as road networks, rail systems and the nodes required at the stadium to enable full use of the transport system.
- **Business/Marketing** - The paramount consideration is that all the key business domains are integrated in a *holistic* multiplicity of interaction, in order to maximise the full market opportunity. This involves the interaction of retailing, tourism, hospitality industries along with the wider sports, leisure and cultural activities.

This chapter has identified the key criteria that collectively define global best practice in stadium location, operation and impact. Chapter 3 tests these criteria through consultations to establish stakeholder perspectives on an in-town versus an out-of-town location for a multi-purpose sports stadium in Northern Ireland.

3.0. Multi-Purpose Sports Stadiums: An Empirical Test of Global Best Practice in Northern Ireland.

3.1 Introduction

This chapter reports on the outcomes from the structured discussions and focus group meetings which were undertaken by the research team with key stakeholder groups in Northern Ireland. The stakeholders were categorised into 10 sectors including Banks, Business, Government, Media, Politicians, Promoters, Property & Planning, Sports Bodies, Tourism, and Transport. The chapter also reports the findings from questionnaires undertaken with the supporters from each of the respective sports codes and with the membership of Belfast City Centre Management. The purpose of the methodology was to consult widely across the spectrum and to collect representative opinion concerning the optimum location and size for a multi-purpose sports stadium in Northern Ireland.

The research methodology has taken an independent position regarding the respective viewpoints on an in-town versus the out-of-town location for a new multi-purpose sports stadium for Northern Ireland. In this chapter the purpose has been to report on the facts presented from the methodology employed. Many of the participants consulted during the course of this research commented from an informed position based on their respective interest in regularly attending the various sporting codes as season ticket holders or as spectators. Furthermore several interviewees had professional experience of advising on the design, planning, development, marketing and management of sports facilities.

Based on a combination of personal and professional experiences there was a consensus that the synergies offered by the in-town location including the pre and post game activities and the holistic city experience surrounding the sporting event will substantially outweigh those offered by a stadium sited in an out-of-town location. The weight of research evidence based on structured discussions, focus group opinion and questionnaire responses endorses the view that the optimum location for a multi-purpose sports stadium is in-town rather than on an out-of-town site.

Regarding the focus group and structured discussions the key issues relating to the respective merits of an in-town versus out-of-town location for a sports stadium are based on the regeneration, economic, infrastructural and marketing perspectives which reflect the approach employed in considering the literature review in chapter 2. In some cases the methodology adopted a structured discussion approach on an individual basis and in other circumstances a focus group approach was used which facilitated interaction of discussion within the group. The findings on each of the key themes are discussed in the following sections.

3.2 Key criteria Governing Optimum Location

In line with the wider body of knowledge from the national and international literature, the vast majority of the stakeholder sectors consulted during this research concurred with the best practice model outline in Chapter 2. A key criterion governing optimum location concerns the spectator expectations when coming to a sports event. Within

a stadium it is the atmosphere and the experience of the sporting occasion which are paramount, hence the *'build it to fill it'* maxim. However, users expect to experience much more than the sports event itself. Users expect a holistic multiplicity of facilities. *"The quality of this experience can only be gained from the diversity offered by an in-town location and cannot be manufactured by the on-site facilities in an out-of-town location"* (Property and Planning Sector).

There is overwhelming support for the in-town location option compared to the out-of-town option. Taking account of the holistic multiplicity of event requirements, most of the stakeholder sectors see greater benefits and synergies from city centre locations for the wider community in Northern Ireland. As outlined in Chapter 2, the model of best practice constitutes the fundamental basis of most stakeholder views. This is also typified by the Chartered Institute of Marketing (CIM) comment, *"international best practice on stadium optimum location and size, which endorses in-town, should be followed"*.

The holistic multiplicity of facilities are defined as those which are convenient to stadiums, especially restaurants and bars, accommodation, entertainment, general retailing and other ancillary attractions such as tourist sites, art and culture venues. As the CIM analogy states, *"It is like baking a cake, you need all the ingredients to be right"*. All of the supporting facilities should be broadly within walking distance of the stadium. According to most of the stakeholder sectors, the ancillary holistic multiplicity of uses virtually dictates that stadiums need to be built in or near to city centres. As representatives from the Tourism and Transport Sectors state, *"you can't have a stadium in isolation, you need restaurants, bars, accommodation and shops"*. Similarly, the key question which an international expert (Tourism Sector) from the UK asks when considering a venue is, *"what is the strength and depth in the ability to market a venue?"* According to respondents from the hospitality industry (Tourism Sector), *"The best place for a stadium is where the critical mass of population is concentrated and a stadium site must have an element of passing trade."*

'There's a large body of opinion that believes that a stadium will only work commercially if it's based in or near Belfast' (Alasdair Mc Donnell MLA)

Conversely the position of some central government departments and agencies (DCAL and SIB) concerning the key criteria governing site selection is based on providing a multi-sports facility that meets the Government's vision for 'A Shared Future' for Northern Ireland. This is based on a peaceful, inclusive, prosperous, stable and fair society founded on the need for reconciliation, tolerance, and mutual trust for all (OFMDFM, 2005). There is a perception in central government that the site at the Maze/Long Kesh offers the potential of a state-of-the-art multi-sports stadium to meet the needs of the three sports codes in Northern Ireland set within the context of an urban sports village.

'The Maze is not a done deal ... so far a lot of the Belfast plans don't stack up. It's not about the location...it's about something of huge significance to the overall development of Northern Ireland' (Edwin Poots, MLA, May2007)

In terms of seating capacity the needs of the GAA will be a big volume provider, followed by football which is increasing as a spectator sport in Northern Ireland.

Likewise the third sporting code of rugby has growth potential built around the Heineken competition but with renovations proposed at Ravenhill this should absorb some of that growth in demand. A recent MORI poll indicated that expanding the end user base across the various sporting codes would necessitate neutrality in terms of location for a multi-purpose sports stadium in Northern Ireland. Central government is of a view that *“the proposed Maze complex will facilitate in providing such a neutral location within the context of the Shared Future agenda.*

It is suggested by central government that *“the Maze/Long Kesh site provides a viable location and development opportunity which has been determined against a number of defining criteria including operational viability; corporate governance involving the setting up of a stadium company linked to an operating company, naming rights, and private sector partners who will absorb a substantial portion of the development risk”* (Central Government).

“A viability assessment of a shared future multi-purpose sports stadium for Northern Ireland, completed in May 2004, concluded that the stadium could be operationally viable provided initial capital costs are met and the three sports bodies (Soccer, Rugby and Gaelic) agree to participate” (Hansard Written Answers, 30th April 2007).

However there is an alternative view that *“the Maze proposal is flawed and based on a case of having a site which is looking for a use whereas the rational approach would be to determine the use characteristics of the proposed development and identify the best site to suit the determining criteria”* (Transport Sector). Many of the other stakeholder sectors (Promoters; Property and Planning; and Media Sectors) argue that the key criteria identified in Chapter 2 are the very things missing from the Maze proposal. For example, good transport links and infrastructure, including hotels and restaurants, and car parking are, in their opinion, the key criteria that are necessary to make a city centre stadium work. Furthermore, it was their unanimous view that Belfast *“wins hands down”*, right across the spectrum, for international events due to its excellent air and sea ports and hotel stock as international events demand an increasingly wide range of accommodation which is only available in Belfast (Promoters Sector).

Stakeholders in the transport group suggest that *“key criteria contributing to optimal location include strategic positioning at the core of a large metropolitan area, meeting the demand-supply requirements of the locality, contributing to the agglomeration economies, providing economies of scale, complementing a good infrastructure network to service the location and its hinterland, offering prestige value, capitalising on the supporting infrastructure and mitigating externality effects”* (Transport Sector). Consequently *“stadiums should be built where the population accumulates for entertainment, leisure and week end breaks which is in city centre locations”* (Business Sector). For example, Belfast Chamber of Commerce and Trade believe that, *“Belfast is a good position for all sports because of the huge catchment area.”*, and *“leisure people need to belong to a venue.”* Likewise the Business Sector considers that *“the core dynamic and driver for a stadium is a critical mass of population in close proximity”*. *“If this population can belong to a stadium then it will stimulate use and provide benefits to a wide range of community sectors”* (Business Sector).

‘City stadiums create a wonderful atmosphere.... and it’s a great sense of occasion much more so I think than it will be when the new Wembley stadium opens because Wembley is in a suburb rather than a city centre’. (Peter Hain Secretary of State for Northern Ireland, whilst talking about the Millennium Stadium Cardiff, March 2007)

3.3 In-town versus Out-of-town Developments

Many of the stakeholder sectors stressed the importance of sustainability as a central plank of government policy. Planning policy in Northern Ireland states an intention to promote the development of city/ town centres. Sports facilities in general and stadiums in particular will require supplementary services such as retail provision with the result that an out-of-town location at the Maze/Long Kesh site would not sit comfortably with policy intent. This is further reinforced by the need to regenerate town centres where a substantial number of brownfield and gap sites within the urban footprint continue to exist. *“The proposed Maze/Long Kesh development will draw attention away from the current planning and development agenda which is focused on brownfield within the urban footprint”*, (Planning & Property Sector).

Discussions at Central Government level have indicated that a proposal to develop a stadium either in-town or out-of-town will be determined in the same way as other planning applications of similar size and complexity. The application will be considered in terms of its acceptability and regard to the relevant strategic planning policies contained in the Regional Development Strategy (DRD, 2001); the Planning Policy Statements (PPSs) and the planning policies at local level contained in the draft Belfast Metropolitan Plan (BMAP), 2015 (DOE, 2004). It is considered that several of the PPSs will have an important impact on planning and development decisions relating to the location and siting of a sports stadium. For example a planning application for a sports stadium would be considered in light of the planning policy guidance contained in PPS 8 (DOE, 2004). Specifically a sports stadium in an in-town location would include considerations regarding the:

- sustainability of the development
- infrastructure provision to support the development including potential traffic generation and congestion
- vitality and viability of the city centre
- benefits derived in the public interest,
- evidence of the sequential approach,
- environmental quality and
- attractiveness of the urban form in the context of the locality

Specific reference was drawn to Policy OS 4 in PPS 8 which relates to ‘Intensive Sports Facilities’ including sports stadiums, with for example, leisure centres, sports halls, swimming pools and other indoor and outdoor sports facilities. The policy draws a distinction on the planning criteria between a development proposal located within a settlement compared to one located at the edge of a settlement. The policy states that *“the development of Intensive Sports Facilities including sports stadia will only be permitted within existing settlements. An exception may be permitted with regard to the development of a sports stadium where there is no alternative site*

within existing settlements; where the proposed development site is located close to the edge of the settlement and can be clearly identified as being visually associated with the settlement; where there is no adverse impact on the setting of the settlement; and where the scale of the development is in keeping with the size of the settlement” (Central Government and Property & Planning Sector).

There is a strong view endorsed by the Property & Planning Sector that on the basis of policy the optimum location for a multi-purpose sports stadium should not be at the Maze/Long Kesh but should be in an in-town location. The vast majority of stadiums occupy in-town locations where the social infrastructure is available to support the sporting clientele. *“Research evidence and best practice case studies clearly reveal the social and economic benefits that in-town based stadiums can offer to the city and in this regard the stadiums in both Cardiff and Dublin indicate the experience and benefits that can be derived on a match day”* (Property & Planning Sector).

The Promoters Sector agreed that an in-town location would provide more options for the people of Northern Ireland and Belfast compared to a stadium at the Maze/Long Kesh. The view of the promoters is that the main arguments for the Maze/Long Kesh seem to be based on a political case. *“There is a strong economic, cultural and social argument for a Belfast based stadium which will yield greater benefit for sports in Northern Ireland”* (Promoters Group). The Promoters, Transport and Media Sectors stressed the importance of the in-town case having a robust, integrated and workable public and private transport policy. One promoter suggested that *“there should be restricted car parking at the stadium to encourage sports fans to walk from the existing car parks distributed around the city or use public and alternative forms of transport to the stadium”*. The Property and Planning Sector indicated that *“the synergies offered by the in-town location including the pre and post game activities and the holistic city experience surrounding the sporting event will substantially outweigh those offered by a stadium sited in an out-of-town location”*. Concerning the latter there is a general perception that *“out-of-town stadiums are soulless places which invariably have inadequate infrastructure and service provision”* (Property & Planning Sector). In this regard the Madejski Stadium in Reading is considered to lack the universal appeal which the city centre based Millennium Stadium in Cardiff and Croke Park in Dublin can offer.

3.4 Regeneration Perspectives

Each of the various sectors consulted consider that a stadium sited in the right location offers major regenerative benefits. From a regeneration policy perspective the city of Belfast as the economic driver for the region still faces major challenges in creating a strong city core and identity. The Odyssey Complex has shown what can be achieved by adding a new experience to the product range of the city. The compact city concept would be further reinforced by the proposed stadium being located at Ormeau Park. This would be consistent with the concept of a “string of pearls” type development referred to by one of the developers. *“The evidence base drawn from other cities such as Cardiff supports the view that benefits will accrue to the end users, sports fans and the community; and that multipliers will result for businesses including hotels, pubs and restaurants in the in-town location”* (Property and Planning Sector). The experience of the promoters of the US market suggests

that *“the stadiums which moved out of the cities have faced major financial challenges as a result of reduced attendances and many are now moving back to city centre locations as a consequence”* (Promoters Sector).

“New stadiums are advancing the cause of community regeneration...Whereas stadiums used to be seen as dull concrete bowls, developers, communities, and central and local authorities see them as catalysts for regeneration and renewal”. (Rod Sheard, senior principal of leading stadium architects HOK Sport and author of *The Stadium: Architecture for the New Global Culture*, 2007).

Furthermore planning policies indicate the need to consider in-town locations and reinforce the need to regenerate urban areas and promote sustainable developments. In this context *“the Maze site will not meet the government’s intended planning policy”* (Property and Planning Sector). It is well established in the literature and based on case example evidence that stadium facilities will economically and socially regenerate an inner city area. However *“there is nothing to regenerate at the Maze”* (Promoters Sector).

Also *“the Maze development is perceived to be primarily public sector-led and financed”* (Transport Sector). On value for money grounds most of the stakeholders find it very difficult to justify the government’s decision to finance a stadium at the Maze/Long Kesh given the pressing financial priorities for other essential public sector services such as health and education. The fact that other private sector-led proposals are on the table to develop a stadium in a Belfast location makes the government’s position on the proposed Maze/Long Kesh development more difficult to justify in the public interest. The pressing issue is that there are priority needs in other sectors and better ways of spending government money on more essential services. There is a strongly held view that a new elected Assembly in reassessing and adopting a different prioritisation on expenditure will have implications for the financing of the Maze/Long Kesh project (All Sectors).

“...so too with other costly projects like the Maze. Its promoters need to be more realistic as costly white elephants are an extravagance when there are more pressing demands from health and education”. (Tom Kelly, March 2007)

“Recent remarks by Hain (Secretary of State) that city centre stadiums provided a better atmosphere than their out of town counterparts should be the catalyst for a policy rethink”. (Dave Pennick, Belfast Chamber of Trade and Commerce)

The location of all new developments including what is ultimately decided on the stadium needs to reinforce the integration between land use and transportation in accordance with PPS 13 (DRD, 2005)). A key regeneration driver will be the ability to link and create connectivity between the outer city, city centre and the proposed site at Ormeau Park (Transport Sector). The dynamic to create this synergy will be dependent in part in encouraging spectators to walk to the stadium from the various parts of the city. The closer integration of Ormeau Park with the city centre can be facilitated in part by the development of pedestrian/cycle bridge crossings linking the eastern and western sides of the Lagan. A question remains concerning the

financing of these infrastructural elements which is necessary to the functionality of the proposals submitted for Ormeau Park (Transport and Property & Planning Sectors).

A stadium in Belfast offers the capacity to act as an economic regenerator for the lower Ormeau area, the city region as a whole and contribute to the Northern Ireland economy. The Point in Dublin was cited as a good example of having a similar regeneration impact on the local economy (Promoters Sector). However on the downside there is a concern that a stadium at Ormeau Park will generate local community concerns (Property & Planning Sector). From a planning perspective, lack of public support and failure to fully address the concerns of local residents in the Ormeau Road and Ravenhill Road areas will create numerous difficulties and delays and impact upon the proposed timescale for development.

“One of the downsides of stadiums is the black box scenario of the blighting effects” (Property & Planning Sector). This is where the careful packaging of the business case for the stadium needs to reflect on the local community and is seen as a regeneration opportunity rather than a development that could create blight and anti-social behaviour. The design issues need to be *“sensitively handled to avoid high monolithic structures and to fit in with the sensitivity of the waterfront and parkland character of the site and its immediate vicinity”* (Planning & Property Sector). In this context there will be a requirement that any stadium form should *“blend organically with the environment and surroundings”* (Government Sector: Planning Service).

There are other externalities caused by on-street parking during match day events (All Sectors). The Ravenhill and Windsor Park grounds illustrate the problems caused by on-street parking on match occasions in the vicinity of each venue. *“In the case of games played at Lansdowne Road and Croke Park in Dublin the police do not permit parking and taxi use within a certain distance from the ground which tends to encourage parking further out, spreads the traffic effects away from the ground, encourages walking to the venue and adds to the atmosphere on big match occasions”* (Property and Planning Sector). It is envisaged that the experience at an Ormeau Park location would resemble that of the Dublin and Cardiff experience. There is a view that the location of the Ravenhill ground encourages the use of car and taxi dominated transport rather than pedestrian or cycle usage. *“A stadium located at the Maze is expected to be largely car dominated and will not be user friendly to pedestrians or cyclists which is contrary to the sustainable agenda of reducing car usage. Consideration of a sustainable transport approach must be a priority in the decision making process concerning a development of this size”* (Property & Planning Sector).

The ability of the security forces and emergency services to cope with a crisis emergency scenario in a city centre stadium is considered to be more straight forward than one located at an out-of-town venue (Chapter 5: Theme 6). However it is considered that resources could be stretched should a number of entertainment events in the city coincide at the same time and at different venues (Odyssey, Opera House, Waterfront Hall) and at a proposed city centre stadium event (Transport Sector).

3.5 Economic Perspectives

Most stakeholders put the potential economic benefits of a multi-purpose stadium at the forefront of their opinions. *“The issue of where and what is only relevant within the key argument which is economic...a new stadium must benefit Northern Ireland economically over everything else”* (Belfast Chamber of Trade & Commerce). This also echoes the views of the hospitality industry respondents, *“a stadium would provide huge economic and social benefits”,* and *“a city centre location is less likely to fail”,* and furthermore, *“for maximum economic potential, Belfast is best, all the atmosphere and facilities are there”* (Business Sector). A respondent from the tourism industry stated *“the socially acceptable perspective is still important but the stadium is primarily for economic benefit”,* and *“a stadium in Belfast makes sense, it has the best chance to realise the economic benefits for Belfast and Northern Ireland and the island of Ireland”* (Business Sector)

An international travel expert emphasised that, *“travellers/tourists will want accommodation, most people will stay four nights, this is the best industry average...they will want to eat, spend money and go to concerts which will contribute to a big money spend”* (Tourism Sector). Those coming to match events from outside the Province frequently stay for a weekend visit with the result that the spin off benefits extend to include a range of uses ranging from buses and taxis to retail, restaurant, pub and hotel spend (Tourism, Transport Sectors). However, we need *“to be geared up to cope...only Belfast can provide that capacity”* (Business Sector). It is interesting that Peter Hain, Secretary of State for Northern Ireland and the Chief Executive of the Tourist Board for Northern Ireland have both publicly spoken in favour of in-town location for a sports stadium for Northern Ireland.

“The weight of the evidence that we heard in the committee was that stadiums around the world benefit tourism when they are located in a city centre”, (John Grogan MP, Northern Ireland Affairs Committee).

The opportunities to capitalise on the entertainment event spend will be more prevalent whereas the impact on retail business and trade on event days may actually reduce potential expenditure. However, the weight of opinion is that, *“The Belfast option is much more tourist friendly with greater potential spend in hotels, restaurants, pubs and clubs, and more sponsorship and VIP opportunities whereas the Maze will be a stand alone destination offering which runs the risk of being poorly supported for most of the year”* (Promoters Sector).

“Apart from the sporting and economic arguments in favour of locating the national stadium in the city, we believe that there would be considerable tourist advantages from such a decision” (Northern Ireland Affairs Committee at Westminster).

Frequency of use is considered to be an important economic contributor. An interviewee from the media involved in stadium research commented that *“stadiums are notorious money losers. For stadiums to pay they need regular major events over the year; something has to be on the grass on a regular basis...stadiums need to be judged on the economic benefits they deliver within a highly competitive commercial arena”* (Tourism Sector).

A key element in the stadium proposals for the development of Ormeau Park is the private sector led approach. For the future viability of a scheme of this nature and magnitude the private sector needs to be the dominant partner with the public sector in a facilitating role. *“The catalytic effect is important in driving the scheme and to ensure its viability in terms of the upfront costs and its sustainability in terms of an adequate income flow further downstream”* (Property & Planning Sector). It is more realistic to see how this will work with the development proposals suggested for Ormeau Park compared to the public sector approach in the Maze/Long Kesh proposal. In the latter there will be high public sector upfront costs and potentially higher public sector costs downstream. By releasing further housing lands in the Lisburn area at the review of the RDS Housing Growth Indicator figures in 2010 it may be possible for the uplift in land value to provide some claw back. However this type of funding strategy is highly risky and could potentially place a high drain on public sector resources (Planning & Property; Transport Sector).

“I get asked a lot, if the stadium and all the other key developments are ever going to happen...the key issues of viability, value for money and affordability are currently being addressed and subject to Government successfully delivering a private development partner”. (David Hanson January 2007)

It is recognised that the relative economic and environmental merits of an in-town versus out-of-town location are not clear cut. Whilst there is a weight of opinion favouring the in-town location, the out-of-town option is influenced by the availability of 360 acres of land which is zoned in the draft BMAP (DOE, 2004) with potential to develop a mixed use scheme. However considerable investment would be required in providing infrastructure and support services which under PPS 13 should be the responsibility of the developer to deliver and fund (Property & Planning Sector). Conversely at Ormeau Park the land is in the ownership of Belfast City Council and would involve the loss of open space in the city to accommodate any proposed development. Ormeau Park has been designated as a Historic Park, Garden & Demesne within the draft BMAP. Justification for the loss of open space will need to be balanced against firstly an enhancement package for the park as a whole and secondly a case outlining the benefits of development in the public interest and to the immediate community. It is considered that gaining public acceptability will be challenging should the stadium development at Ormeau Park proceed.

The view expressed by a number of the sectors is that in terms of potential usage/patronage, support infrastructure, financial stability/viability, and private sector commitment, Ormeau Park is perceived to be an optimum location for a stadium. The additional spend in the hospitality sector, pubs restaurants and hotels will help create employment opportunities in the lower Ormeau area and throughout the city generally. It is difficult to see how this would be similarly translated at the Maze/Long Kesh (Promoters Sector). The loss of open space to the city is interpreted by some to be a disadvantage yet a balanced perspective would suggest that the loss will be compensated for by the sustainable development considerations, which will be incorporated within the stadium proposals.

3.6 Infrastructure Perspectives

In the context of the draft BMAP infrastructure is of central importance to the strategic positioning of the city region and to the functionality of the city centre. The stadium offers the potential to raise the stakes further by creating the critical mass for a more action orientated agenda on infrastructure requirements and connectivity between the modal split of airports, ports, trains and bus transport. Evidence from other European cities shows that the functionality between the transport modes is more structured which has a positive spin off for sports stadiums. Also the design of European stadiums is much more innovative. In Madrid, for example, the multi-storey car parking provision is built into the skin of the stadium and is less space-intensive than in some of the UK stadiums. The upgrading of public transport provision in the Belfast Metropolitan Area is an essential priority and central to meeting our emission targets. Capital investment by government should be complemented by other financing vehicles such as developer contributions, development agreements and planning gain accruing from specific development proposals such as the proposed stadium.

Stadiums should be plugged into the transport network at the centre of our cities, (Rod Sheard, senior principal of leading stadium architects HOK Sport and author of The Stadium: Architecture for the New Global Culture, 2007).

Under PPS 13 where a development necessitates the provision of additional transport infrastructure, including new public transport services, developers will be required to bear the cost of these works (Government Sector: Roads Service). Contributions from developers will be based on securing improved accessibility to sites by all modes with an emphasis on maximising access by public transport, walking and cycling. *“The implication for the Maze/Long Kesh site is that developers will be expected to finance all of the infrastructure costs including improving access to develop sustainable modes of travel”* (Government Sector). Clearly the cost associated with providing infrastructure in locations which are away from town centres and major interchanges are more daunting compared to development in more central locations (Government Sector). However it is anticipated that in the case of the in-town location developers will face infrastructure challenges of a similar nature (Planning & Property Sector).

Developing stadiums can be an expensive business (Business Sector). In response to questions raised in the House of Commons by Kate Hoey MP, on the costs that Government has spent on the Maze/Long Kesh project to date the Secretary of State responded as follows.

“To date Government and SIB have spent £916,855 on the proposed multi-purpose stadium project at the Maze/Long Kesh. These costs include £124,727 on business planning which incorporates both scoping and feasibility. From 2004 to the end of this financial year (2007), the OFMDFM will have spent some £2.9 million on site clearance, demolition and decontamination to prepare the Maze/Long Kesh regeneration site for redevelopment”. (Hansard Written Answers, 30th April, 2007)

It is suggested by most stakeholder sectors that the case for the stadium in Belfast cannot be sold as a single speculative venture. Instead it needs to be carefully

articulated into the business case for the city and sold as a key initiative to unlock the need for more imaginative and integrated decision making on the infrastructure commitment for the city. *“This way the stadium assumes a much more important strategic role to unlock inertia, create critical mass, lever infrastructure investment, benefit the public interest and generate social and economic spin off for the city”* (Transport Sector). In turn these outputs fit squarely with the spirit and intention of planning policy. The stadium based on a business case for investment in infrastructure for the city plus the wider physical, social and economic benefits needs to be carefully sold as a package so that it fixes firmly on the imagination of the decision makers (Planning & Property Sector).

The Transport Sector argue that based on evidence from other cities particularly in Europe regeneration benefits can flow from having an integrated transport system in place to support major sporting events in addition to meeting the normal day-to-day functioning of activities. However in the case of Belfast the in-town location would appear to have some difficulties. Some consider that the Ormeau Road and Ravenhill Road are already under pressure and will experience further stress if a stadium goes in at Ormeau Park. Likewise the Maze/Long kesh is perceived to have major constraints due to the lack of infrastructure. It is suggested that *“clearly any decision regarding a proposed location for a stadium within the Belfast Metropolitan Area will need to go hand-in-hand with infrastructure investment”* (Property & Planning Sector). It is further suggested that *“the infrastructure needs to go in first in order to address the existing pressures and prior to the entry of further major traffic generators such as a stadium”* (Transport Sector).

A proper functioning and fully integrated infrastructure system is needed in Belfast which links surface access to the ports and airports. Whilst greater connectivity is an objective of the Department for Regional Development, Translink, and Roads Service the on-going problem of integrated decision making continues to hinder progress. The initiatives on bus corridors are a welcome improvement although there needs to more innovative ways of encouraging better public transport provision and demand management to reduce car usage.

From a taxi operators perspective a 42,000 capacity stadium at an out-of-town location could not be serviced effectively by taxi businesses for their corporate clientele and regular customers from a Belfast base. Experiences from a race day at the Maze Racecourse, which is a much smaller event suggests that the 10 miles (20 miles round trip from Belfast) takes too long to service. On a normal race day the demand for taxis is staggered and is manageable over the course of a 3-4 hour period. Where events end at a set time taxi demand pattern plateaus quickly and places pressure on the system. *“If the stadium is built at the Maze the same scenario will occur with a peaking of demand immediately after the end of matches”* (Transport Sector). A city centre venue would be much easier to service.

There is a view that *“the transport and social infrastructure in the Lisburn area is wholly inadequate and is unlikely to be created should a stadium go to the Maze site”* (Tourism Sector).

As a visitor to the city of Lisburn I am struck by the lack of any cultural and entertainment facilities. For example on walking into the city centre one Friday evening I noticed that everything was shut. The whole place seemed as dead as the proverbial door nail”, (Letter from a visitor to Lisburn published in Belfast Telegraph, 25th May 2007)

By contrast Belfast has the hotel infrastructure in place with accommodation on offer at various price ranges. It is considered that Lisburn cannot compete with the well established hotel market and entertainment sector in Belfast which the corporate sector will demand in terms of offering a quality product. Furthermore with a number of new hotels in the development pipeline and high rates of room occupancy indicates why Belfast is so far ahead in the hotel market.

3.7 Business Perspectives

There is considered to be a real need for a marketing case which makes Belfast a destination for the city region and to attract business and investment to the city through sport linked to the activities of the Belfast Visitors Convention Bureau (Transport Sector). An in-town location for the stadium will provide additional synergy in creating ‘Destination Belfast’. The branding of Belfast as a tourism-leisure-sporting destination will bring enormous economic benefits and generate the multiplier effects. *“Investment in product including infrastructure will generate greater capital return if targeted to Belfast”* (Transport Sector). Consequently a Belfast based stadium is seen to offer the potential of delivering greater benefits/returns compared to a Maze/Long Kesh based stadium which does not have the product.

However concerns were expressed regarding Belfast City Council’s position towards the importance of promoting and marketing sport. The Business Group expressed some doubts on whether a coherent policy approach is in place when compared with the administrations in other international cities which actively champion sport through a targeted marketing strategy. In this regard the sporting experience will be influenced by the quality of facilities and infrastructure. The Irish Football Association (IFA) view is that, *“what is needed is a state-of-the-art facility of appropriate size and seating capacity, corporate hospitality, parking, accessibility and easy access and proximity to pubs and clubs”* in order to promote sport in Northern Ireland.

From a marketing perspective the proximity of Belfast City Centre is deemed to be important to the overall sporting experience which has the components to cater for the preamble and the post match event (Business Sector). Part of the experience is that most people wish to walk the last part of the journey to stadiums. *“People wish to walk, indeed expect to walk in order to enjoy the experience along the way on match days”* (Government Sector: Carrickfergus Borough Council). *“For big games most people walk, for example, Edinburgh, Cardiff, Dublin and Twickenham, people get a bus/cab part of the way and walk and visit the hostelrys enroute from the city centre to the stadium”* (Tourism Sector). In the case of the new proposed Pompey Centre in Portsmouth due to the site constraints relatively few car parking spaces are provided at the stadium. Accessibility is encouraged through more sustainable means involving a combination of walking, cycling, rail, park and ride and bus as the modes of travel.

'So why is anyone even contemplating going to the Maze? Where is the business case for it? Stadiums near city centres bring an atmosphere and a sense of occasion to a country where sporting events take place. Cardiff's Millennium Stadium is a classic example' (Kate Hoey MP April 2007).

The marketing criteria that stand out as the most important in providing the sporting experience are atmosphere and ambience. These factors are influenced by the capacity of a stadium. *"Atmosphere is very important, there is nothing worse if it is half empty"* (Government Sector: Carrickfergus Borough Council). The Tourism Group experts take a similar view where the seminal perspective is *"build it to fill it and use it frequently through domestic events"* (Tourism Expert). The general consensus from most stakeholder sectors was a stadium size between 20,000 and 30,000 seats which could be filled most frequently by most of the main sports codes. *"The ideal stadium size for a Northern Ireland catchment population is 25,000-30,000"* (Sports and Media Sectors).

Stakeholders were virtually of the same opinion concerning the tourism benefits which a stadium in the optimum location can generate, supported by the holistic multiplicity of offerings provided by a city as a major visitor draw. The view was that whilst a major sporting event was the main and initial attraction, the city provided important ancillary benefits. *"The in-town location has the hard and soft infrastructure which is necessary to support the marketing of large sporting events"* (Tourism Sector). Within the Belfast Metropolitan Area the surrounding towns of Carrickfergus, Holywood and Bangor will also benefit from tourist influxes into Belfast. Lisburn would benefit from the same potential spin off of tourist visits and employment opportunities. *"Supporters and visitors coming to a sports event in Belfast will generate greater economic spinoff for us and assist in promoting a marketing strategy for the town and the Belfast City Region"* (Government Sector: Carrickfergus Borough Council).

Most stakeholder groups see a positive spin off in marketing the sports stadium for use in off-peak periods for community purposes and events. *"There will be a scheduled programme of sporting events when the stadium will be in use but outside of this community groups should be encouraged to make use of the facility at other times which will be more accessible if it has an in-town location"* (Tourist Sector: Hospitality). This marketing approach involving community use and buy-in supports the literature and case study evidence. Successful stadiums are those that engaged the local communities in a full and frequent capacity. As a condition of the planning permission, the development plan of the new Pompey multi-purpose sports stadium in Portsmouth has incorporated a community based leisure centre.

"Architects are increasingly incorporating environmental and social incentives into their plans as stadiums become the focus of local communities rather than being pushed to the outskirts of towns only to be used in season". (Rod Sheard, senior principal of leading stadium architects HOK Sport and author of The Stadium: Architecture for the New Global Culture, 2007)

The sustainability of an out-of-town stadium at the Maze/Long Kesh is a key issue with the marketing experts, *"Many are concerned that we could have another Millennium Dome whereby financial realities are distorted by political intent"*

(Business Sector). The advice of the business stakeholders is that *“there is only one message for making it work, it has to be led by experts who know how to make it work...it is not for politicians...it has an art form on how to make it work”* (Business, Tourism Sectors).

‘..it needs to be sited where there are good transport links and the infrastructure is there to support it..... when the politicians, architects and lawyers move on it’s the buying public who will vote with their feet.....there has been a move across the world to bring stadiums back into city centres’ (Paul Sargeant Former Chief Executive Millennium Stadium Cardiff now General Manager of Sun Corp Stadium Brisbane February 2007)

Many of the essential messages from the stakeholder consultations are captured in the perspective offered by the Council of the Northern Ireland Chamber of Commerce and Industry. By adopting an essentially neutral stance on the location of a stadium, the Chamber reflects the wide range of views and preferences of its membership on the matter. The Council has offered a number of points for consideration which include the following:

- A new sports stadium will be a significant and valuable asset to Northern Ireland and has the potential to be a catalyst for large-scale investment in infrastructure, tourism and cultural development.
- The location of the stadium must ensure that it is accessible and attractive to the widest possible sporting and cultural audience.
- Whichever location, in-town or out-of-town is chosen, Government must ensure that the associated infrastructure is capable of supporting a project of this scale.
- The final decision on location should be based on an objective strategic, financial and infrastructure analysis.
- The final decision should not be based on political considerations.
- Before a final decision is taken, the new Northern Ireland Assembly should ensure that the widest possible consultation is undertaken.
- When the final decision is taken, Government should provide a detailed analysis of the advantages and disadvantages of the in-town versus out-of-town locations and the reasons for selecting the chosen location.

3.8. Stadiums Sports Users Perspectives

The attitude of sports users of was gauged among supporters of GAA, rugby and soccer by means of some attitudinal surveys covering the following issues - the location, size and the method of travel to and from a new stadium. A copy of the questionnaire used is set out in Appendix 3 below.

On the question of stadium location, supporters were asked to express a view about the location of a new stadium in Belfast City Centre. Rugby and soccer supporters were overwhelmingly in favour of the city centre location (85% and 87% respectively. GAA supporters surveyed were marginally against a city centre location (52% against and 48% in favour). This reflects a number of factors. GAA supporters are

distributed more evenly geographically across Ulster; they tend to view Croke Park as the "home" venue and Clones as the Ulster provincial "home"; some GAA supporters do not readily identify Belfast as a GAA-friendly location.

In terms of the size of a new sports stadium, there was a divergence of opinion between supporters of the three codes. Only 9% of GAA supporters favoured a 20,000 seater stadium with over 70% wanting a 40,000+ seater venue. This contrasts with the views of soccer fans. 58% of those surveyed said they preferred a 20,000 seater stadium and only 12% preferred the 40,000+ option. Rugby supporters were more fragmented in their preferences. 20% of those surveyed wanted a 20,000 seater stadium, 50% wanted a 30,000 seater stadium and 30% wanted a 40,000+ seater stadium.

Supporters were also asked to give details of how they might travel to and from a city centre stadium. The responses from the three codes were quite similar. A majority of GAA (51%), rugby (55%) and soccer (56%) supporters said they would travel by car. Around 13% of all supporters said they would use a combination of car and public transport. Between 10 and 11% of fans said they would use public transport and then complete the journey on foot. Furthermore 10% of GAA and 13% of rugby and soccer fans said they would use public transport exclusively.

These survey results illustrate that there are significant differences of opinion between GAA supporters on the one hand and rugby and soccer supporters on the other hand on the issue of a city centre sports stadium. This is reinforced by divergences in views over the size of a new city centre sports stadium, with GAA fans preferring a 40,000+seater arena and soccer and rugby fans wanting a much smaller venue.

When their opinion was canvassed, GAA, rugby and soccer supporters expressed diverging views on the location of a stadium. While rugby and soccer fans overwhelmingly backed a city centre location, opinion was evenly divided among GAA supporters. This difference of opinion was further underlined by divergent views on the size of the sports stadium with GAA supporters preferring a 40,000+ seater stadium and rugby and soccer supporters opting for a smaller venue.

3.9. Summary

The key findings from this chapter are:

- In line with the wider body of knowledge from the national and international literature, the vast majority of the stakeholder sectors consulted during this research concurred with the best practice model outline.
- A key criterion governing optimum location concerns the spectator expectations when coming to a sports event. Within a stadium it is atmosphere and experience which are paramount, hence the 'build it to fill it' maxim. The quality of this experience can only be gained from the diversity offered by an in-town location and cannot be manufactured by the on-site facilities in an out-of-town location.

- The holistic multiplicity of facilities are defined as those which are convenient to stadiums, especially restaurants and bars, accommodation, entertainment, general retailing and other ancillary attractions such as tourist sites, art and culture venues.
- The position of some Central Government departments concerning the key criteria governing site selection is based on providing a multi sports facility that meets the Government's vision for 'A Shared Future' for Northern Ireland which includes the needs of the three sports codes and is endorsed by the main political parties.
- Central Government indicate that the Maze/Long Kesh site provides a viable location and development opportunity which has been determined against a number of defining criteria including operational viability; corporate governance involving the setting up of a stadium company linked to an operating company, naming rights, and private sector partners who will absorb a substantial portion of the development risk.
- There is a view that the Maze proposal is flawed and based on a case of having a site which is looking for a use whereas the rational approach would be to determine the use characteristics of the proposed development and identify the best site to suit the determining criteria.
- From a planning perspective a sports stadium proposed in an in-town location needs to have regard to the sustainability of the development; infrastructure provision to support the development including potential traffic generation and congestion; vitality and viability of the city centre; benefits derived in the public interest; evidence of the sequential approach; environmental quality and attractiveness of the urban form in the context of the locality.
- There is a strong economic, cultural and social argument for a Belfast based stadium which will yield greater benefit for sports in Northern Ireland. The synergies offered by the in-town location including the pre and post game activities and the holistic city experience surrounding the sporting event will substantially outweigh those offered by a stadium sited in an out-of-town location. In this regard there is a perception that out-of-town stadiums are soulless places which invariably have inadequate infrastructure and service provision.
- Planning policies indicate the need to consider in-town locations and reinforce the need to regenerate urban areas and promote sustainable developments. In this context
- The evidence base drawn from other cities such as Cardiff supports the view that benefits will accrue to the end users, sports fans and the community; and that multipliers will result for businesses including hotels, pubs and restaurants in the in-town location.

- In the US market the stadiums which moved out of the cities have faced major financial challenges as a result of reduced attendances and many are now moving back to city centre locations as a consequence.
- On value for money grounds most of the stakeholders find it very difficult to justify the government's decision to finance a stadium at the Maze/Long Kesh given the pressing financial priorities for other essential public sector services such as health and education. The fact that other private sector-led proposals are on the table to develop a stadium in a Belfast location makes the government's position on the proposed Maze/Long Kesh development more difficult to justify in the public interest.
- A key regeneration driver will be the ability to link and create connectivity between the outer city, city centre and the proposed site at Ormeau Park. The dynamic to create this synergy will be dependent in part in encouraging spectators to walk to the stadium from the various parts of the city.
- A stadium in Belfast offers the capacity to act as an economic regenerator for the lower Ormeau area, the city region as a whole and contribute to the Northern Ireland economy.
- A stadium located at the Maze/Long Kesh is expected to be largely car dominated and will not be user friendly to pedestrians or cyclists which is contrary to the sustainable agenda of reducing car usage. Consideration of a sustainable transport approach must be a priority in the decision making process concerning a development of this size.
- The Belfast option is much more tourist friendly with greater potential spend in hotels, restaurants, pubs and clubs, and more sponsorship and VIP opportunities. In terms of potential usage/patronage, support infrastructure, financial stability/viability, and private sector commitment, Ormeau Park is perceived to be an optimum location for a stadium whereas the Maze/Long Kesh will be a stand alone destination offering which runs the risk of being poorly supported for most of the year.
- The implication for the Maze/Long Kesh site is that developers will be expected to finance all of the infrastructure costs including improving access to develop sustainable modes of travel. Clearly the cost associated with providing infrastructure in locations which are away from town centres and major interchanges are more daunting compared to development in more central locations.
- The case for the stadium in Belfast cannot be sold as a single speculative venture. Instead it needs to be carefully articulated into the business case for the city and sold as a key initiative to unlock the need for more imaginative and integrated decision making on the infrastructure commitment for the city. This way the stadium assumes a much more important strategic role to unlock inertia, create critical mass, lever infrastructure investment, benefit the public interest and generate social and economic spin off for the city.

- An in-town location for the stadium will provide additional synergy in creating 'Destination Belfast'. The branding of Belfast as a tourism-leisure-sporting destination will bring enormous economic benefits and generate multiplier effects. Investment in product including infrastructure will generate greater capital return if targeted to Belfast. Consequently a Belfast based stadium is seen to offer the potential of delivering greater benefits/returns compared to a Maze based stadium which does not have the product.
- Successful stadiums are those that engaged the local communities in a full and frequent capacity. The sustainability of an out-of-town stadium at the Maze/Long Kesh is a key issue with many concerned that we could have another Millennium Dome whereby financial realities are distorted by political intent.
- When their opinion was canvassed, GAA, rugby and soccer supporters expressed diverging views on the location of a stadium. While rugby and soccer fans overwhelmingly backed a city centre location, opinion was evenly divided among GAA supporters. This difference of opinion was further underlined by divergent views on the size of the sports stadium with GAA supporters preferring a 40,000+ seater stadium and rugby and soccer supporters opting for a smaller venue.

Regardless of issues about location, any multi-purpose sports development should be commercially sustainable. The following chapter defines a stylised model of best practice in terms of the commercial requirements underpinning sports stadia.

4.0 Multi-Purpose Sports Stadiums: Evaluating the Business Model

4.1 Introduction

Following the same process as used in Chapter 2 and Chapter 3, a search for *best practice* in successful sport stadiums was carried out amongst several modern developments in GB. Evidence of best practice frameworks in the business model for such stadiums was also gleaned from worldwide literature examples. Along with this evidence GB stadia such as the Cardiff Millennium Stadium, Huddersfield's Galpharm Stadium, the Reebok Stadium outside Bolton, the new Doncaster Stadium, and the KC Hull Stadium provide evidence of best practice business models. For reasons of confidentiality and commercial sensitivity, actual revenue figures are not used in this Chapter, instead percentages are given. It is deemed that these percentages serve to illustrate the essence of the business model. This evidence enabled the creation of a best practice business model for multi-purpose stadiums as set out in Figure 2 below. The remainder of this Chapter deals with this best practice model and the extent to which successful GB stadia conform to it.

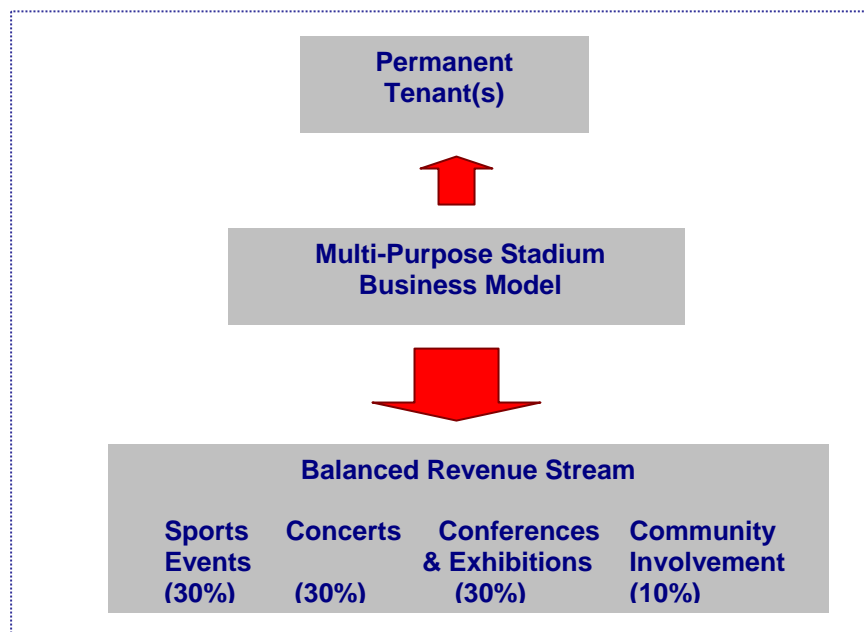


Figure 2 Best Practice Business Model

4.2 Multi Purpose Tenants

Best practice dictates that, although some stadiums are successful with one tenant, for example, Southampton Football Club at St Mary's, the majority of stadiums require more than one major sports tenant if the balanced best practice of revenue streams is to be secured. So, Huddersfield have an extremely strong partnership with the football club and the rugby club whereby the boards of these are the same

as the Stadium's board. Hull has two major tenants in the Hull City AFC and Hull FC Tigers (Rugby League).

The funding model in most cases would appear to be either private finance, as in the case of St Mary's or PPP, such as Huddersfield whereby the stadium was funded by the two sports clubs, the local council and government, through grant entitlements.

It is important to all stadiums that sports tenants have 'lock-in' contracts for anything up to fifteen years, thus ensuring continuity of revenues for long term planning and budgeting.

4.3 Balanced Revenue Streams

The core revenue streams for any multi-purpose sports stadium must be balanced between major sports events, concerts and conferences and exhibitions, with an ongoing outreach to local communities as venues for community involvement. This revenue balance varies according to stadium circumstance. In very broad terms, a balanced portfolio or revenue streams would equate roughly to 30% sports events, 30% concerts, 30% conferences and exhibitions and 10% community events. Obviously this balanced portfolio varies according to each stadium's unique circumstance.

In the Cardiff Millennium Stadium, owned by Welsh Rugby Union, approximately 25% of revenues come from rugby matches. In recent times this revenue proportion would have been greater because of being used as an alternative to Wembley Stadium. Significantly, the Cardiff Stadium secures approximately 50% of its revenues from conferences and exhibitions.

The Hull KC Stadium draws revenues approximating to 50% from sports because of its all year round use by rugby league and association football. The stadium has a healthy conference and concert revenue stream at some 35%. The remaining 15% of revenues result from exhibitions, community events and one-off activities.

The Huddersfield Galpharm Stadium relies more heavily on sports events with 70% of revenues coming from its two major sports tenants, football and rugby. The remainder of revenues is provided by concerts and conferences and exhibitions.

The Bolton Reebok Stadium derives 82% of its revenues from football (ticket sales, TV rights etc.), 5% from hospitality, 6% from sponsorship and advertising, 4% from a fast-growing events business, 3% from merchandising and licensing sales.

The Doncaster Stadium draws revenues from a genuinely cross sports profile. The newly built stadium publicity outlines this multi-purpose usage:

"The Lakeside Sports Complex, incorporating the 15,000 seat Keepmoat Stadium, was opened by Mayor Martin Winter in December 2006 and has already hosted several major events.

The complex is a single high quality venue designed to the highest possible architectural standards to match its superb location on the water's edge at Doncaster

Lakeside. It will help raise Doncaster's profile locally, regionally, nationally and internationally, and increase significantly the numbers of local people able to watch and take part in sporting activities.

The complex is also the new home for Doncaster Lakers Rugby League Club, Doncaster Rovers Football Club, Doncaster Rovers Belles Women's Football Club and the Doncaster Athletics Club.

Complementing the sporting activities, are a number of educational and community facilities which are of the highest standard to meet the needs of the people of Doncaster regardless of age, gender, ethnicity and physical abilities”.

4.4 Event Generated Revenue

The actual number of games played annually at best practice stadiums is not huge. For example, Cardiff attracts only 20 – 25 major games a year, as stated above, representing only 25% of revenues. However, the huge size of the stadium generates massive revenues, even at an average attendance of 40000 generating £3m in ticket sales. Hull and Huddersfield host approximately 50 sports games per annum, in line with their unique business model's balance of 50% - 70% of revenues coming from this source.

4.5 Concert Generated Revenue

Most stadiums would appear to host only a few major concerts per annum, however such concerts generate considerable revenues over the several days of a concert event. So for example, Cardiff might target approximately 16 major concerts per year; ticket sales alone can make a huge contribution.

4.6 Ancillary Generated Revenue

All stadiums rely heavily on ancillary revenues from catering and merchandising. For example, Cardiff might hope to generate retail merchandising revenues of £400,000 from one night at a big pop concert. Similarly, catering for such large numbers over several hours per event generates considerable additional revenues. Also, if a stadium has car parking facilities, such as Huddersfield, this can be a sizable source of revenue. Being in the city centre the Huddersfield Stadium can lease the car park to local companies during working week days.

4.7 Conference and Exhibition Generated Revenue

All stadiums view conferences and exhibitions as important revenue sources. Stadium managers are aware that their facilities are larger than most other venues in their locality.

“We have a conference and banqueting team selling this on an ongoing basis. We’re the only place in Huddersfield that can take 500 delegates seated. It is used for all kinds of club annual dinners. It is very much a local community facility. This keeps the stadium going Monday – Friday” (Sean Jarvis of Huddersfield).

The ability to host combined conference and exhibitions simultaneously with large numbers of delegates is a huge attraction. All stadiums feel their conference and exhibition facilities should be larger than the 500 -1,000 already in place. A limiting factor for many stadiums in terms of hosting concerts, conferences and exhibitions is protection of the playing surface. For example to accommodate a large conference it costs the Millennium Stadium £250,000 to lift and replace the pitch. More recent advances in pitch technology have prompted greater interest in roofed stadia coupled with specialist floodlighting that encourages grass growth. This enables playing surfaces to be covered to accommodate event audiences. The Emirates Stadium adopted this approach and its success is now being copied.

4.8 Atmosphere and Experience

An important component for all stadia is the desire of the business manager to create a unique atmosphere and experience for fans at sports events. Managers believe that this is best achieved through a full stadium and close proximity to the playing surface. An observation by one stadium manager in relation to this year’s rugby and football internationals at Croke Park was highlighted. *“The size of the playing surface for rugby and football was an issue, it was simply too large for these sports. I wouldn’t want to have this problem in my stadium” (Jarvis Huddersfield Galpharm Stadium)*

4.9 Best Practice Business Model and the Maze/Long Kesh

Taking account of the 30% of revenue streams stemming from sports events in the best practice business model, there would appear to be an issue with the Maze/Long Kesh business model. For example, it has been intimated that the Maze/Long Kesh would attract 22/24 major sports events for the three sports codes per year. From the case example, this would appear to be similar to the Cardiff Millennium Stadium’s number of sports events. Cardiff can offset this relatively low number of sports events through hosting conferences, concerts and exhibitions as a city centre venue. This point is reinforced in 4.4 and 4.5 above. It is clear that there is greater pressure to ensure increased revenue streams from the other components of the best practice business model. How this can be achieved from the available evidence is difficult to see.

Summary

The key findings from this chapter are;

- **More than one tenant** - A majority of stadiums require more than one major sports tenant in order to establish a more balanced revenue structure.

- **A 'balance' of revenue streams** - Although in practice there is a range of revenue models depending on sports stadiums, operators tend to strive to achieve a balance of revenues (Figure 2).
- **Size is an issue for revenue frequency** - Larger stadiums tend to host relatively fewer sporting events whereas smaller stadia tend to rely more heavily on more frequent sporting usage. This reflects relative economies of scale.
- **Flexible use of the playing surface** - Many stadium operators also host concerts though these tend to be relatively infrequent due to concerns about protecting the playing surface.
- **Conferences and exhibitions are an important growth area** - Most stadiums compete for conference and exhibition business given their potential to generate larger revenues and commissions.
- **Ancillary revenues are important additional revenue streams** - The growth in ancillary revenues to stadia operators reflects a diversity of marketing strategies and local circumstances.

It is clear from the findings that the ability to host a diverse range of sporting and non-sporting events is an important ingredient in the commercial success of modern sports stadia. The linkages between the location of a sports stadium and the full range of supporting and ancillary services are explored in the next chapter.

5.0 Multi-Purpose Sports Stadiums: Spatial Analysis

5.1 Introduction

The purpose of this chapter is to identify the optimum location for a multi-purpose stadium on the basis of key indicators considered in Chapters 2 and Chapter 3. A series of maps will be generated using Geographic Information Systems (GIS) software as a tool for spatial analysis. The maps differentiate specific locations within Belfast City Centre, and highlight the key issues relating to each potential site. This is designed to inform discussion on the basis that all other contributing factors to the decision-making process are equal from an infrastructural perspective.

The chapter is structured as follows: the methodology underpinning this analysis is stated in section 5.2; indicator maps prepared using GIS are shown in section 5.3 followed by an analysis of the theme; key issues arising from the spatial analysis are surveyed in section 5.4.

5.2 Methodology

The approach adopted for spatial analysis, designed to identify and scrutinise possible locations for a stadium, is for the investigation to be infrastructure-led. That is, the analysis examines infrastructural factors considered critical for delivering a viable and successful multi-purpose sports stadium. The three stages to this study are:

1. Data gathering – access datasets from central and local government
2. Preparation of maps using GIS
3. Examination of maps to identify the optimum stadium location

Stage 1 considers the presence of various infrastructural elements that are necessary for successful stadium development. For spatial analysis these location factors are categorised under six themes:

1. Transport (a) public transport nodes: rail and bus stations
2. Transport (b) strategic transport infrastructure: sea and air ports
3. Transport (c) car parking facilities
4. Transport (d) key transport corridors and arterial routes
5. Entertainment: cafes/restaurants/bars and hotel accommodation
6. Health and safety: hospitals, fire stations and police stations

Stage 2 involves the preparation of maps to show outward distances from each element of infrastructure. Proximity is an important issue for the viability of a stadium; each theme can therefore be interpreted as an indicator of the potential for development. Preparation and analysis of map is undertaken for both Belfast City Centre and also the Maze/Long Kesh site.

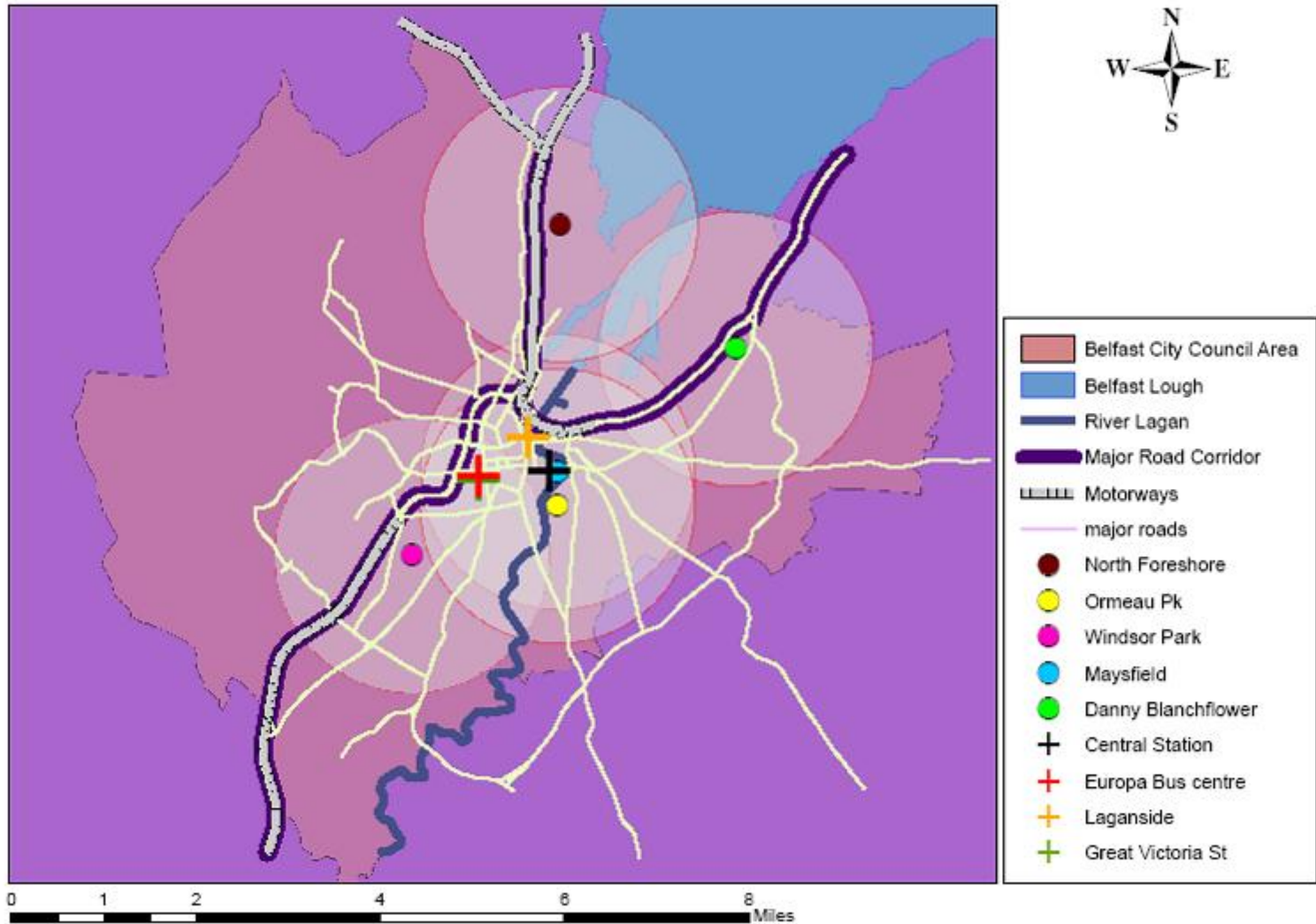
Each component of the six themes will be buffered to analyse optimum location on the basis of distance from infrastructure. For example, successful stadia

developments demonstrate that visitors will typically walk between a maximum of 1 and 1.5 miles to/from transport nodes, car parking facilities, entertainment facilities, and hotel accommodation. To visualise this, buffering is at 0.5-mile intervals for the entertainment and transport themes. The final stage is to analyse the results by overlaying each of the themes in order to identify the optimum site based on proximity to infrastructure. Infrastructure-based indicator maps are illustrated as follows.

5.3 Infrastructure-based Thematic Maps

The following infrastructure-base thematic maps, constituting Stage 3, will highlight the key issues relating to a number of potential sites (North Foreshore, Ormeau Park, Windsor Park, Maysfield, and Danny Blanchflower) for a multi-purpose sports stadium in the Belfast Metropolitan area with a view to informing discussion on the key factors which should have an impact on the decision-making process relating to optimum location.

Map.5A. Public Transport Nodes within the Belfast City Council area in proximity to the proposed Belfast stadium locations



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Theme 1 – Transport (a) – public transport nodes: rail and bus stations (Map 5A)

ISSUES

Quality public transport connectivity is critical for ensuring efficient and safe movement of users to/from the stadium site. The guiding rationale is that mass public transport use is significantly more desirable than relying on private transport, particularly motorcars. The environmental impact associated with transport movements around the stadium site is an issue; this negative impact can be considerably alleviated by an emphasis on public rather than private transport. Another key influencing factor is the effective use of existing infrastructure capacity.

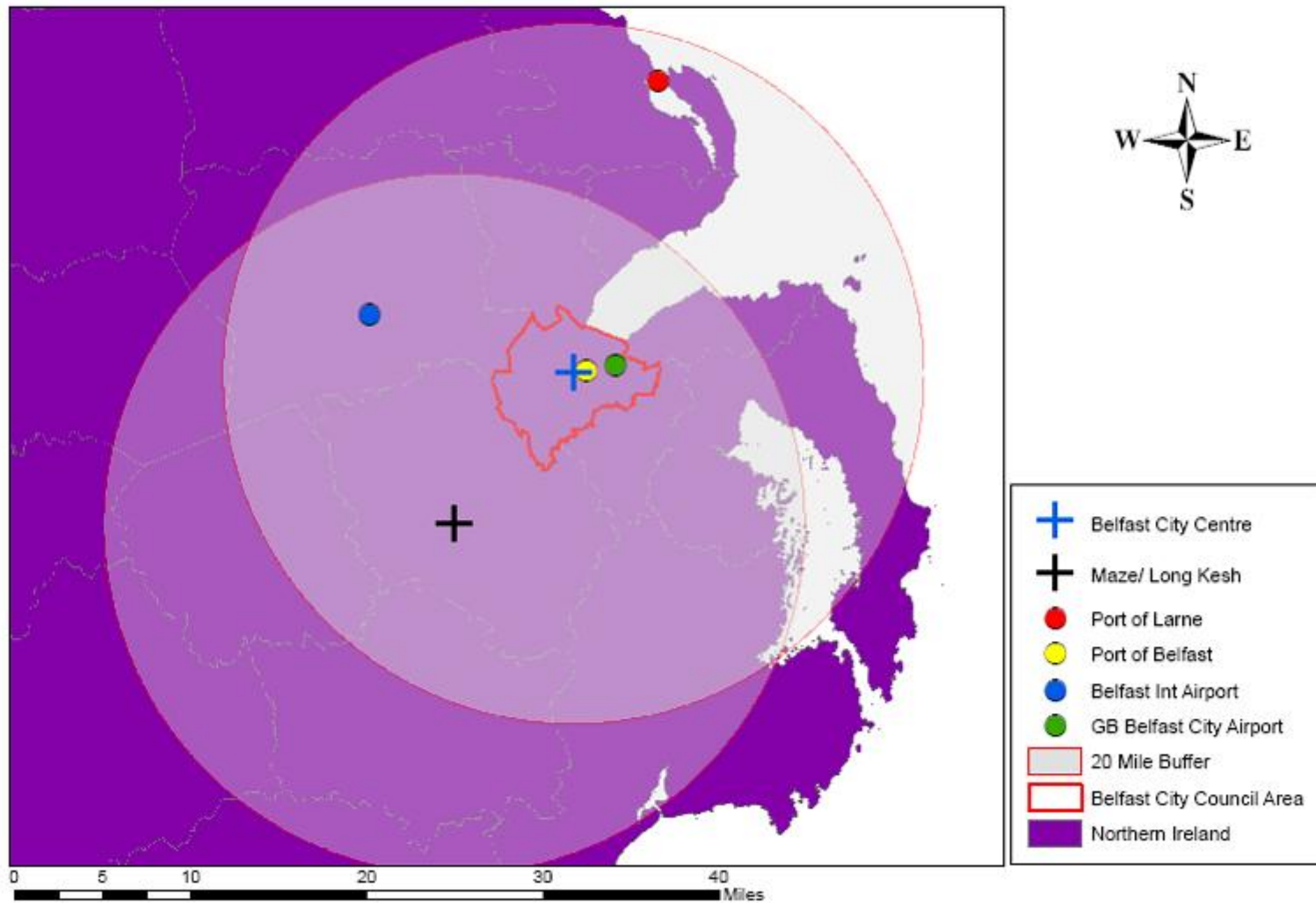
DESCRIPTION

Belfast City Centre is well endowed with public transport facilities including major railway and bus stations and the key transport interchange at Great Victoria Street all located within one mile of City Hall. Moving out from the city centre railway halts are located on the northern, southern and eastern approaches, and the public bus network services all the arterial routes.

ANALYSIS

A series of buffers were calculated around the main rail and bus transport nodes at 0.5, 1 and 1.5 mile radii in order to show the relationship with potential sites for a stadium. Whilst public transport capacity does exist on the northern, southern, and eastern fringes of the city centre, map 5A highlights that a stadium site located close to the city centre will benefit from enhanced proximity to transport nodes. This would suggest that the optimum stadium location lies within a one-mile radius of City Hall rather than at, for example, Windsor Park, the Blanchflower Stadium or the North Foreshore area. Both the Ormeau Park and Maysfield sites are within a one-mile radius of Central Station, Great Victoria Street/Europa Station and Laganside Bus Station, indicating that these two sites offer the best connectivity within and outside of Belfast on the basis of existing public transport facilities.

Map.5B. Strategic transport locations: Sea and Airports within a 20 mile proximity to the proposed sites for the new national stadium



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Theme 2 – Transport (b) – strategic transport infrastructure: air and sea ports (Map 5B)

ISSUES

It is anticipated that a significant number of visitors to the stadium will travel into Belfast from beyond the island of Ireland. This is already the case for international sporting events, and is an increasing phenomenon for various arts festivals. The aspiration for this stadium to become a world-class venue is dependent on international connectivity via air and seaports. Visitors may stay in Northern Ireland only for the duration of the event, whilst others will have an extended stay. International accessibility must therefore consist of different modes of travel to meet these varying forms of visitor demand such as direct air links and car ferry transport.

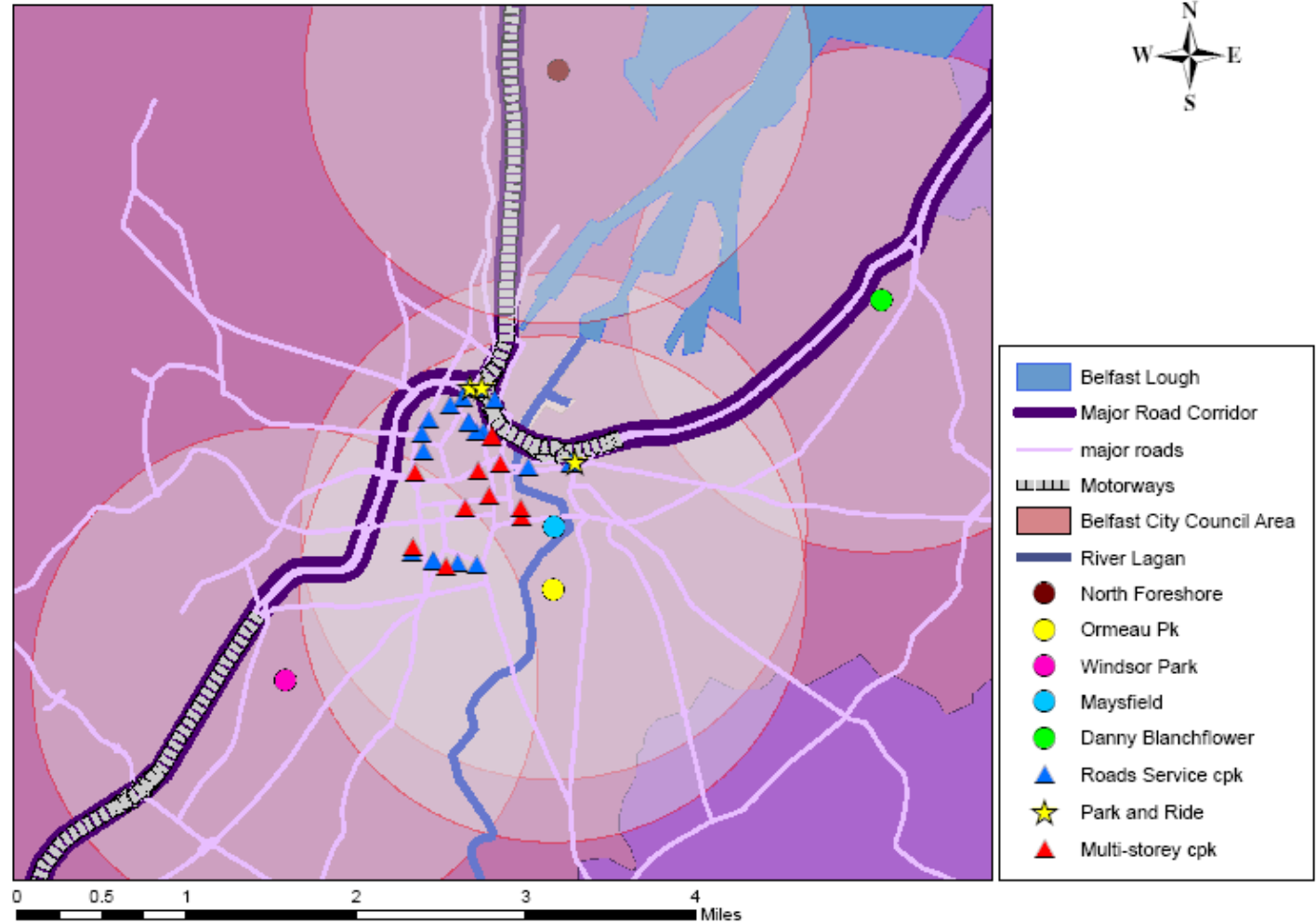
DESCRIPTION

Located on the eastern seaboard of Northern Ireland, Belfast is well served by both air and seaports. This includes facilities within the city – Port of Belfast and George Best Belfast City Airport – with further provision located at Belfast International Airport (Aldergrove) and Larne Ferry Terminal. Both airports serve a wide variety of national and international destinations with links into key European hubs at London Heathrow, Amsterdam and Paris, and also direct connections to North America. Car, passenger and freight sea services connect Northern Ireland with Scotland and northwest England, offering an alternative to air travel.

ANALYSIS

Connectivity into Northern Ireland, and then within the region, are key factors in establishing the optimum location for a new stadium. With enhanced national and international services, accessibility is increasing. As each of the potential stadium sites is located within the Belfast Metropolitan area, distances were calculated from a single point in Belfast City Centre to air and seaports within a fifty-mile radius that offer passenger or car transportation services. The Port of Belfast and George Best Belfast City Airport are located within 1 and 2.5 miles of the city centre respectively, with Belfast International Airport and Larne Ferry Terminal 18 miles and 22 miles from the city centre. Belfast is located at the hub of the strategic road network and also direct rail and/or bus links to the ports. With regard to connectivity, Belfast is ideally situated as the location for a new stadium.

Map.5C. Multi-Storey and surface parking provision within the Belfast City Council area in relation to proposed Belfast stadium locations



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Theme 3 - Transport (c) – car parking facilities (Map 5C)

ISSUES

Not all journeys to/from a new stadium will be undertaken by public transport. Successful stadia models suggest that demand for car park facilities will remain. This is particularly the case for visitors who are without adequate public transport provision near their homes. Such visitors should be encouraged to travel onward to the stadium on foot or by public transport from car parks within the city or surrounding area. The provision of car parking may encourage multi-purpose visits to the stadium and environs using one vehicle, which would support economic regeneration. For example, people might travel together into Belfast participating in different social or economic activities.

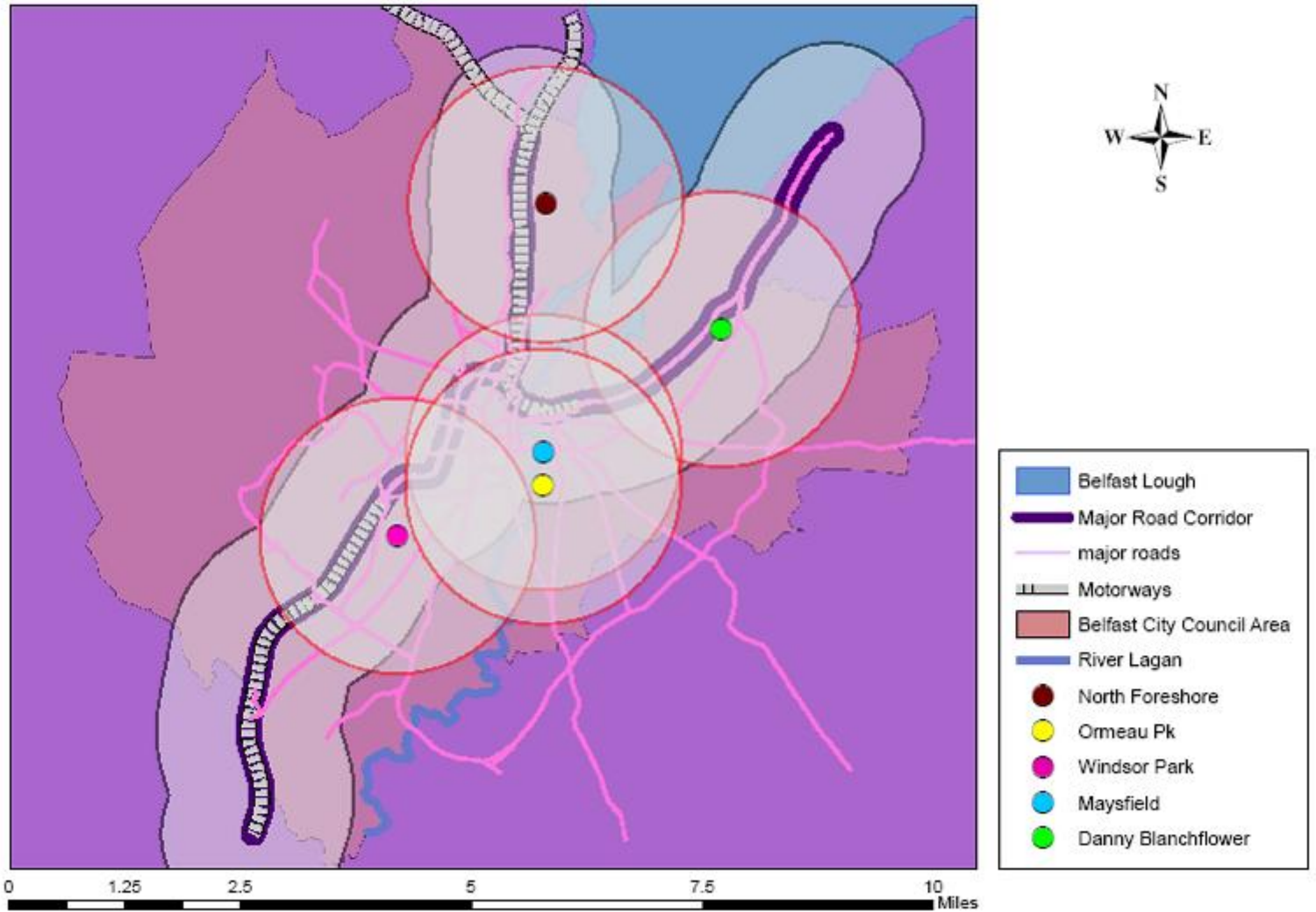
DESCRIPTION

Designated car parks, which function wholly as car park facilities, are clustered around the city centre. Such car parks respond to the demand in the immediate and surrounding area from city centre visitors. Given the nature and timing of events that will be held at the stadium, it is unlikely that demand for stadium-associated car parking will conflict with other generators, for example business use. The highest peak of demand from all uses is anticipated for Saturday afternoon events. A total of 6,939 spaces are available at car parks across the city centre with 4,965 at multi-story facilities and 1,974 at Roads Service car parks. This total does not include temporary private surface car parks that may provide additional capacity such as at Kings Hall or Boucher Road.

ANALYSIS

A series of buffers were calculated at 0.5, 1 and 1.5-mile radii around potential stadium sites to show proximity to car parks. Both the North Foreshore and Danny Blanchflower locations are without off-site car park facilities in the surrounding area. Four multi-story car parks are within 1.5 miles of Windsor Park, but none of these lie within 1 mile of the site. This site would therefore be at the edge of acceptable walking distances by visitors to the stadium, though this could be alleviated by enhanced local public transport links and car park facilities at Kings Hall or Boucher Road. The optimum location for a new stadium, with regard to proximity to existing car park infrastructure, is Maysfield. There is also potential for Ormeau Park, as a number of car parks are located within one mile of this site, but this is dependent on the installation of a new pedestrian link across the river Lagan.

Map.5D. Key transport corridors and arterial road routes within the Belfast City Council area in relation to proposed Belfast stadium locations



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Theme 4 – Transport (d) – key transport corridors and arterial routes (Map 5D)

ISSUES

Accessibility to a stadium by road will be of paramount importance for both spectators and performers. The road network has a critical role in the smooth and safe dispersal of spectators away from the stadium site after an event has ended. Sites must therefore have the capacity for multiple entry and exit points from/to the wider area.

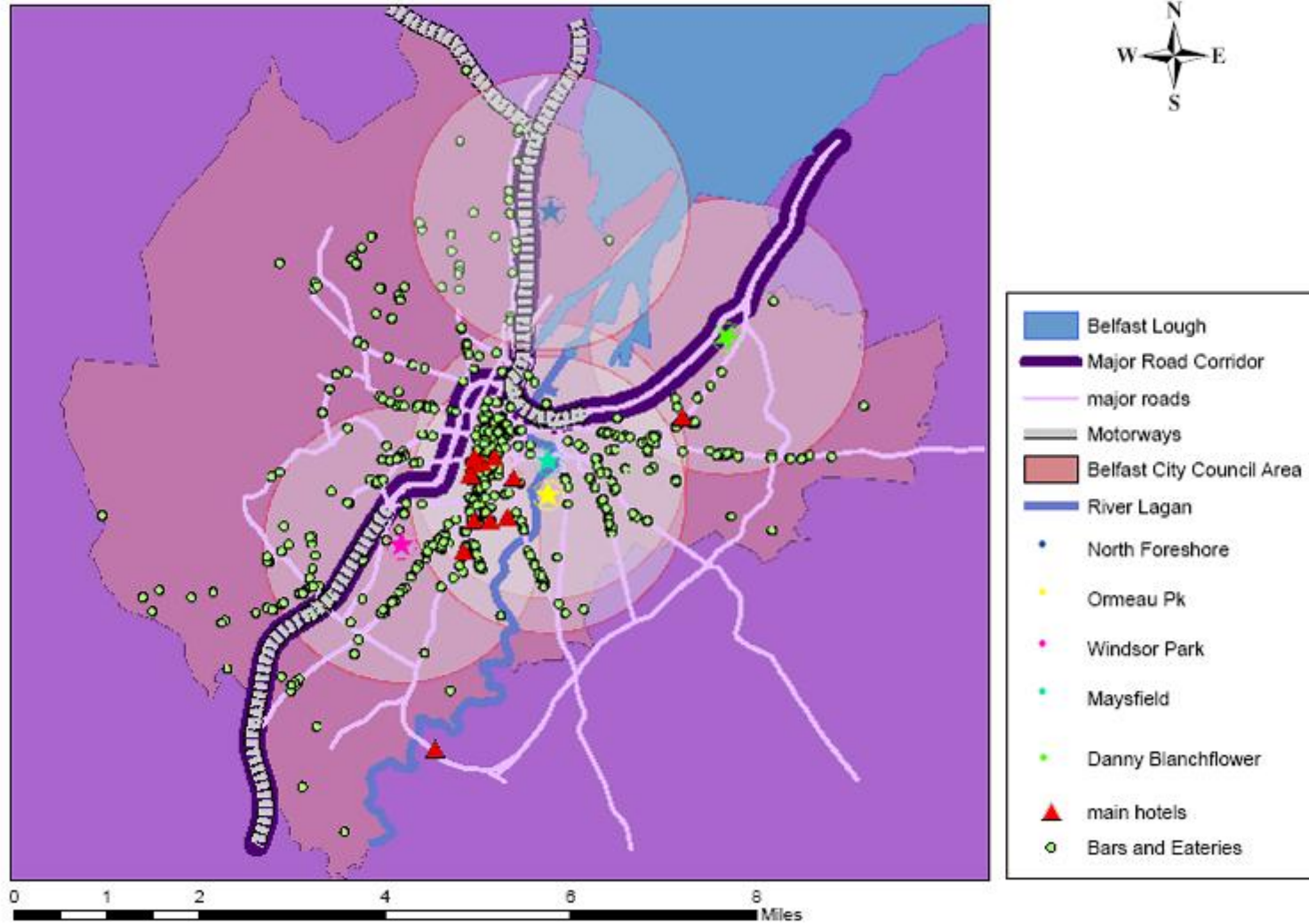
DESCRIPTION

Belfast city centre is at the hub of Northern Ireland's road network. Motorways radiate out from the city in a Y-form connecting the region. Key arterial routes, commonly dual-lane roads, also converge on the city centre from the north, south, east and west. The arterial routes and motorway network are linked via the outer and inner ring roads facilitating the movement of vehicular traffic across the city. Both the strategic road network and the arterial routes into Belfast have benefited from infrastructure upgrades in recent years including the Westlink widening scheme incorporating M1 motorway to Blacks Road; the introduction of bus lanes to facilitate bus, taxi and cycle traffic; and physical regeneration of neighbourhoods and road frontage properties on the arterial routes. Future schemes include widening the M2 motorway from Sandyknowes to Greencastle, enhancing traffic flows from the North and North East of the region.

ANALYSIS

A series of buffers were calculated around potential stadium sites at 0.5-mile radiuses to show proximity of these locations to the strategic road network. Each of the potential sites is located in close proximity to major roads: North Foreshore beside M2/M5 motorway; Windsor Park near to M1 motorway and Westlink; Danny Blanchflower beside the Sydenham Bypass, Outer Ring, and Holywood Road; Ormeau Park near to Ravenhill Road and Ormeau Road; Maysfield on Albertbridge Road, connecting to other arterial routes and the motorway network. This would suggest that these sites are better connected for the purposes of moving people to/from a stadium.

Map.5E. Spatial proximity of Bars/ Eateries and the main hotels within the Belfast City Council area in relation to proposed Belfast stadium locations



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Theme 5 – Entertainment – cafes/restaurants/bars and hotel accommodation (Map 5E)

ISSUES

A key driver for the success of a new stadium is proximity to cafes, restaurants, bars and hotel accommodation. A holistic approach to the 'event experience' incorporates visitor social activities both before and after a sports game or concert takes place. This contributes to the positive atmosphere of an event, and contributes significantly to economic development. It is the experience of best practice that these facilities should ideally be available within walking distance of a stadium. In turn this reduces the number and length of trips by car and taxi, thereby limiting congestion in the immediate area and also the environmental impact.

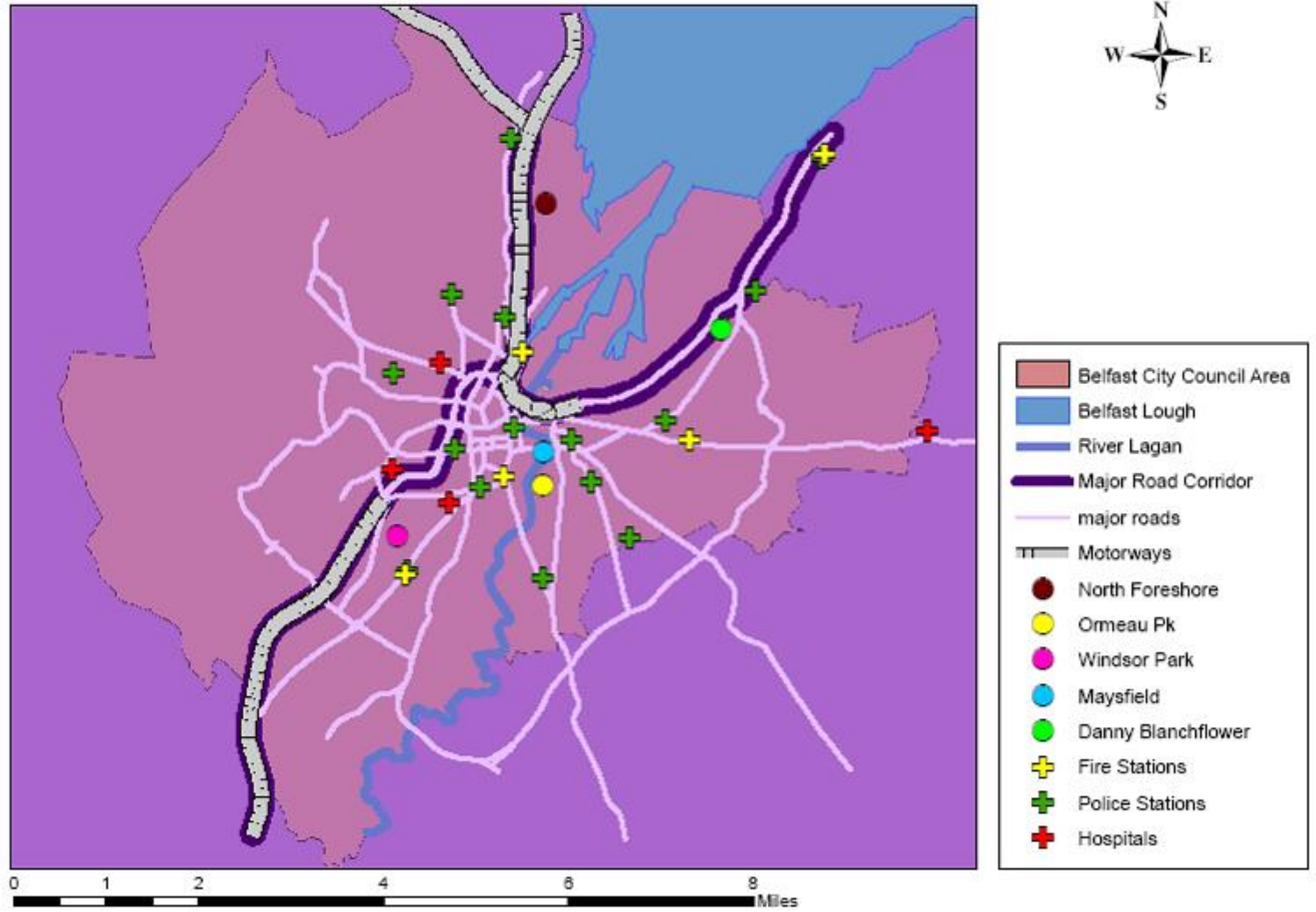
DESCRIPTION

Belfast benefits from a significant level of social venues. In particular, the city is renowned for the 'Golden Mile' stretching from City Hall to the University area, and includes a high number of bars, restaurants and nightclubs. These are a significant draw into the city throughout the week and especially at weekends. This forms part of the regional visitor experience, with tourists from elsewhere in the region, the island of Ireland, and internationally travelling to the city for socialising and entertainment. Whilst these facilities are spread throughout Belfast, two main clusters can be observed in the city centre and south Belfast areas.

ANALYSIS

Buffers were calculated at 1.5 mile from potential stadium locations, representing the greatest distance that visitors are likely to walk from a stadium in order to reach social venues. The current national football stadium at Windsor Park demonstrates that proximity to pubs, clubs and restaurants is a positive influence on the visitor experience and event atmosphere. With regard to the optimum location for a new stadium, both Maysfield and Ormeau Park sites are located within one mile of both the city centre and south Belfast clusters. This provides a high level of choice for pre- and post-event entertainment, which is a key demand of stadium users. Other locations, at North Foreshore and Danny Blanchflower, do not have the critical mass of entertainment venues required in the surrounding area compared to the proximity of the other city centre sites.

Map.5F. Strategic emergency service locations within the Belfast City Council area in relation to proposed Belfast stadium locations



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Theme 6 – Health and safety – hospitals, fire stations and police stations (Map 5F)

ISSUES

The construction of a new stadium irrespective of location, introduces a range of health and safety issues. In particular, the capacity of emergency services to manage a major incident is critical to the wellbeing of visitors to an event, and also the local population. Whilst major incidents are rare, the infrastructure for handling a response from the emergency services must be examined involving the location of hospital facilities, fire stations and police stations. Proximity to this health and safety infrastructure will facilitate a swift and effective response to incidents that may occur at the stadium.

DESCRIPTION

Belfast is the major urban settlement in Northern Ireland. As result, significant infrastructure for health and safety already exists in the city. This includes four regional hospitals comprising City, Mater, Royal and Musgrave Park (non-acute services); six fire stations dispersed across the city incorporating high-reach appliances and other specialist equipment; and fifteen police stations. All of these facilities are located on, or next to, arterial routes and the motorway network.

ANALYSIS

A series of buffers were calculated around potential stadium sites at 0.5, 1 and 1.5-mile radii to show proximity to hospitals, fire stations and police stations. The North Foreshore and Danny Blanchflower sites have the lowest level of contiguous health and safety infrastructure, with both sites lacking hospital services within a 1.5-mile radius. Two hospitals – City and Royal – are located within one mile of the Windsor Park site; fire and police stations are within 1.5 miles. The proximity of the M1 motorway and Westlink brings the added potential for dispersing casualties across the region, should the need arise. Two hospitals are within 1.5 miles of Maysfield and one hospital is located under a mile from Ormeau Park. In comparison to other possible sites, both Maysfield and Ormeau Park have a higher level of police infrastructure with eight stations located inside a 1.5-mile radius. The proximity of hospitals, fire and police stations to Windsor Park would suggest that this site is the most suitable with regard to necessary health and safety infrastructure.

5.4 Summary

The key findings from this chapter are:

- Belfast is the ideal location in Northern Ireland taking into consideration key infrastructural elements required for a new stadium.

This includes the existing presence of transport, entertainment, and health and safety infrastructure all in close proximity to the city centre.

- Locating a new stadium in Belfast will, through the managed and efficient utilisation of existing capacity, reduce the need for additional expenditure on infrastructure as would otherwise be required for new roads or rail connections at the Maze/Long Kesh site.
- Belfast is at the hub of regional public and private transport networks. This unique strategic position consequently facilitates access into the region from key national and international locations and, once in Northern Ireland, enables ease of movement to entertainment and other tourist venues.
- Belfast has the transport and entertainment infrastructure necessary to attract and hold visitors attending events at a new stadium. In turn this could generate significant economic development benefits for the city and spinout across the Northern Ireland region.
- Several locations were examined in order to identify the optimum site on the basis of proximity to infrastructure. The outcome from this analysis is that the Ormeau Park and Maysfield sites are the two best locations with regard to transport accessibility within the city, and the presence of entertainment venues.

6.0 Multi-Purpose Sports Stadiums: In-town/Out-of-town Developer Proposals

6.1 Introduction

This chapter builds upon the preceding chapters by providing a historical context to and review of the key development sites and proposals for a multi-purpose sports stadium in Northern Ireland. The out-of-town proposal for the Maze/Long Kesh is discussed followed by a review of the in-town proposals. The Maze/Long Kesh Masterplan and Implementation Strategy Final Report is available for review at www.ofmdfmi.gov.uk/masterplan.pdf. The in-town proposals are discussed in general terms as the proposals contain commercially sensitive information that at this point in time is considered to be confidential in nature and not available for disclosure.

6.2 The Historical Context to a Multi-Purpose Sports Stadium in Northern Ireland

A review of the multi-purpose sports stadium proposals that are currently available for Northern Ireland needs to be considered within a historical and sporting context examining the background to their development, their potential use by sporting bodies, the location, condition and capacity of existing stadiums used by the sporting bodies and the locations and sites being considered for multi-purpose sports stadiums by public and private sector developers.

The diversity of the development proposals for a multi-purpose sports stadium stems from project sponsors' and developers' definition of a multi-purpose sports stadium. The definitions for '*a multi-purpose sports stadium*', '*multi-purpose*', '*sports*', '*stadium*' and '*shared values*' and '*shared futures*' are discussed in Section 1.4 of this report. Each of the development proposals examined in this chapter should be considered within the context of these definitions.

The three sporting bodies, the Gaelic Athletic Association (GAA), the Ulster Branch of the Irish Rugby Football Union (IRFU) and soccer's governing body in Northern Ireland, the Irish Football Association (IFA) currently stage their sporting events at separate locations.

The GAA use Casement Park which is the principal GAA stadium in Belfast. The ground has a stated capacity of approximately 32,000. Casement Park opened for the first time in June 1953, a major facelift of the stadium took place in 2000 and special floodlights were added which now enable hurling and football to be played in the evening. St Tiernach's Park, the GAA's stadium in Clones has a capacity of about 36,000 and is the most modern stadium for gaelic games in Ulster.

Ulster Rugby use the Ravenhill stadium located in south east Belfast which has a normal capacity of approximately 12,300 and is owned by the IRFU. A

planning application is currently under consideration by the Planning Service to upgrade and develop Ravenhill and a decision is anticipated in 2007.

The IFA currently stage all Northern Ireland national football (soccer) team fixtures at Windsor Park in south Belfast. Windsor Park is the home ground of the Northern Irish football club, Linfield FC. Windsor Park was first opened in 1905 and had a peak capacity of 60,000. In the 1980's, the covered terrace opposite the main stand was damaged in a fire. It was demolished and replaced with a modern 6,800 seater North Stand, on two tiers and with a cantilever roof. In the late 1990s, the open west terrace, 'the Spion Kop' was also demolished and replaced with a 5,000 seater stand now named the 'Alex Russell Stand'.

The current capacity of the ground is approximately 20,300, of which 14,000 is seated. The venue usually sees its biggest crowds for Northern Ireland national football (soccer) team international fixtures, from which Linfield FC receive a percentage of the gate receipts. In December 2006 the North Stand suffered storm damage and in January 2007 an independent report stated that the South Stand with its wooden structures represented a significant health and safety risk. It is understood that a sum of up to £500,000 would be required to initiate immediate repairs and it was intimated that Linfield FC and the IFA would make application to Government for "patching up" Windsor Park in the short term to ensure Linfield FC could make application for a UEFA licence in order that international fixtures could continue to take place at Windsor Park.

In October 2000, Michael McGimpsey MLA, then Minister for Culture Arts and Leisure in the NI Assembly established an advisory panel to consider how NI soccer could move forward. The 'Creating a Soccer Strategy for Northern Ireland' document published in 2001 attempted to provide a strategic direction for the game, the first time government had become involved in drawing up proposals for the future of soccer in Northern Ireland. The IFA has been a long time supporter of the concept of a 'national' stadium for Northern Ireland. Proposals contained within the 'Creating a Soccer Strategy for Northern Ireland' document also suggested that such a development take place. Recommendation R14.1 stated that:

'A *national* stadium, which would provide a neutral and welcoming environment and meet international standards for football (soccer) should be established.'

At a time when Government have been giving consideration to the development of a stadium the sporting public have become aware of the trend in Great Britain and Europe to provide modern 21st Century facilities within major cities in which major sporting events can be held. Following completion of the Millennium Stadium in Cardiff in 1999, the redevelopment of Hampden Park in Glasgow was completed in 2000, Croke Park, Dublin was completed in 2004, Arsenal's Emirates stadium was completed in 2006 and new Wembley was recently completed in March 2007. Evidence would indicate that both the public who regularly attend sporting fixtures in

Northern Ireland and the sporting bodies would aspire to having a similar high quality stadium development in the Province (Sports bodies & supporters groups).

In 2002 a number of former security sites were transferred to the Northern Ireland Executive by the Government. The Strategic Investment Board (SIB) was asked to work with the OFMDFM and other strategic partners outside government to explore the potential for regenerating the largest of the sites, Maze/Long Kesh. The site offered the potential to transform the symbols of past division to icons of a shared future. The Government saw the potential to explore an exciting multi-faceted development on the 360 acre site. One of the most significant proposals for the site was a multi-sports stadium which it was suggested had the potential to bring together gaelic sports, soccer and rugby in one world class 21st Century shared future facility which would put Northern Ireland on the map for hosting major international sporting, musical and other high profile events.

The Government stated that the proposed construction of a new multi-sports stadium at the Maze/Long Kesh represented the opportunity to bring together the three sporting bodies, the IFA, GAA and IRFU and to secure the long term viability of the project. The stadium required a tripartite arrangement between the three sports codes.

A longstanding issue has been the level of cooperation between the IFA and the other national governing bodies (the GAA and the Ulster Branch of the IRFU). To be financially viable, the Government required the three main national governing bodies of sport in Northern Ireland to commit to the use of a stadium in a proportionate manner. Presently, it would appear that the GAA have no immediate need for a new stadium, in Belfast or in Northern Ireland, and that Ulster Rugby, following upgrade and redevelopment, will continue to use Ravenhill. Therefore it has been construed by many that a new stadium will be primarily used for soccer and that the GAA and IRFU may effectively be subsidising the IFA's involvement in a 'national' stadium project through allocation of fixtures to the venue.

In January 2004 the Government began a consultation process to ascertain the feasibility and levels of support that existed for the construction of a new 42,000 fully seated stadium in Northern Ireland. Whilst this was a development broadly welcomed by those involved with sport, others questioned the level of investment needed for a stadium of this size.

In May 2004 SIB placed a public advertisement inviting landowners to submit details of suitable sites. The public notice indicated that the sites should have a minimum size of 60 acres and be capable of accommodating a 30,000 seater sports stadium and associated facilities. The key evaluation criteria for the site assessment included firstly acceptability to the key anchor tenants; secondly deliverability of the site; and thirdly economic benefits to Northern Ireland.

In response to the public advertisement twelve sites were submitted by landowners for consideration by SIB/DCAL. The sites were:

- Craigavon
- Grosvenor Road
- Land near Junction 1
- Ex Maze Prison
- Land near Moira
- Musgrave Park
- Nutts Corner
- North Foreshore
- Ormeau Park
- Sydenham (Thomas Patton Memorial Park, Blanchflower Stadium and Tillysburn)
- Titanic Quarter, and
- Valley Park.

The evaluation of the sites is detailed within a report submitted to SIB/DCAL by Davis Langdon. The executive summary of the report states that the Musgrave Park site was subsequently withdrawn by Belfast City Council. SIB and the promoters of the Titanic Quarter site considered that given the high land value placed on that site, the opportunity for alternative uses and the availability of other sites at much less cost to the public purse, the landowner could withdraw the site as a potential stadium candidate. All other sites, with the exception of the ex-Maze Prison site and the North Foreshore, did not meet the evaluation criteria and were not considered further.

SIB and the consultants considered that the two candidate sites, the ex-Maze Prison Site and the North Foreshore merited further detailed consideration. The second stage evaluation was a more detailed assessment of the two sites but focused particularly on deliverability.

Following evaluation of site issues, planning, transport and access considerations and the potential for enabling development it was concluded that the ex-Maze Prison site possessed relatively more of the deliverability requirements than the North Foreshore site particularly given the uncertainty regarding the extent of site contamination and the limited scale of adjacent commercial development (Multi Sports Stadium Technical Report Executive Summary DCAL/SIB).

In January 2006, following lengthy and prolonged consultation, the three sporting bodies submitted to Government their formal commitment 'in principle' to the multi sports stadium proposal at the Maze/Long Kesh.

The IFA were prepared to progress the matter on the basis that:

“ ... All aspects of planning for the site provides the necessary infrastructure that will be required for football to be promoted effectively both in the stadium itself and on the entire Maze site... the final business plan is acceptable to IFA...the necessary commercial support is in place to help sustain the project... there is a 3-5 year interim plan which is acceptable to the IFA to allow international football to continue to be played in the Province. And that parallel to this it will be essential that: there has to be in place an agreement acceptable to Linfield Football Club and the IFA expects Government to demonstrate that these issues can be addressed before the IFA could arrive at a final decision which is legally binding. The IFA also reserves the right to select the most appropriate option which serves the needs of football” IFA: Executive Committee Press Release, 20 January 2006.

The IRFU and Ulster Rugby confirmed their support in a statement which said:

“... the IRFU supports in principle the concept of a multi-sports stadium in Northern Ireland. Subject to satisfactory legal, financial and practical matters between relevant stakeholders, the IRFU also supports the concept of certain Ireland ‘A’ international matches being played there and would also agree to staging certain full international matches at the stadium from time to time. Likewise, Ulster Rugby, whilst regarding Ravenhill as its current and future home, is agreed in principle to the concept of a multi-sport stadium subject to all material and consequential matters being satisfactorily resolved” IRFU Press Release 27 January 2006.

The GAA confirmed their support in a statement which said:

“... the GAA is committed to continued involvement to the progression of the development plans for the proposed multi-sports stadium at the Long Kesh/Maze site” Nickey Brennan, President of GAA, 11 December 2006.

Whilst SIB were examining the feasibility of meeting the Shared Future agenda, the private sector were keen to bring forward proposals to develop a sports stadium in Belfast. In November 2005, an article appeared in the Belfast Telegraph publicising potential stadium developments at Ormeau Park and Maysfield. Private sector developers presented proposals to Belfast City Council officers and committees from November 2005 to January 2006.

In June 2006 Belfast City Council issued a development brief to seven developers who had previously expressed an interest in developing a major multi-purpose sports stadium at Ormeau Park, Maysfield or the North Foreshore sites.

In July 2006 three developers, Durnien.com, City of Belfast Stadium Limited, KUD International and Sheridan Millennium Limited submitted proposals to develop a multi-purpose sports stadium in Belfast. All developers proposed to locate the stadium at Ormeau Park.

In September 2006 the three developers presented their proposals to a Special Community and Recreation Committee of Belfast City Council. The summary of the three developers proposals discussed later in this Chapter is based upon the published minutes of that Committee (BCC Community & Recreation Committee Minutes 21st September 2006).

6.3 The Sites: Out -of- town and In-town

A summary of the key sites for which development proposals exist is considered in the following section.

1. Maze/Long Kesh

In planning terms, the Maze/ Long Kesh is in the countryside, outside the planned settlement limits. It first appeared in planning policy through a safeguarding definition as “Strategic Land Reserve of Regional Importance” in BMAP.

The Maze/Long Kesh Masterplan published on 30 May 2006 indicated that the land use for the development is 347.66 acres (140.70 hectares) which includes 63.55 acres (25.72 hectares) reserve land for future use. The development requires a further 18.53 acres (7.5 hectares) for off site works.

2. Ormeau Park

Ormeau Park occupies a prominent site at Ormeau Road, Ormeau Embankment, Ravenhill Road and Park Road, The park currently provides areas of green space, woodland and a range of leisure facilities, tennis courts, bowling green golf course, playground and playing pitches for outdoor sport as well a access roads, car parking facilities and public paths. In its entirety Ormeau Park is 144 acres. A new South Belfast Leisure Centre is also proposed for the Ormeau Park site. The area extends to approx 35.5 acres, identified as the potential site for the stadium development and a leisure facility.

In terms of surrounding land uses the proposed site is set within a parkland setting. The predominant land use on the Ravenhill Road to the east is residential. A large number of small retail, office and residential properties extend the entire length of the Ormeau Road. The Gasworks site is located opposite Ormeau Park on the west bank of the River Lagan. This area around the River Lagan has been the focus of concentrated regeneration activity over the past decade. Vehicle and pedestrian access is achieved from Ormeau Embankment and other pedestrian paths linking through to other parts of the parkland. Ormeau Park is located in close proximity to the city centre which is easily accessible by a range of transport modes. From

the North the site can be accessed easily via the M3. In addition, two of the arterial routes; the Albertbridge Road and the Ormeau Road all provide easy access to the site.

The Belfast Metropolitan Transport Plan (BMTP) proposes to establish quality cycling and walking networks, linking key transport, leisure, retail, commercial and civic locations. Included within the proposals is the development of two new pedestrian/cycle bridge crossings linking the eastern and western sides of the River Lagan. The BMTP indicates that the bridges could be funded as part of the regeneration of Belfast. One of the two proposed bridges would link Ormeau Park to the city centre via the Gasworks Site. Previously, Laganside Corporation had considered the feasibility of the provision and procurement and funding of this bridge. Central Railway Station is located just north of the site on the opposite side of the River Lagan. The development of a footbridge would have an important role to play in encouraging the use of more sustainable means of transport such as rail, foot and bicycle to the site.

In the draft BMAP the lands are zoned as an area of existing open space. A local landscape policy area is also designated at Ormeau Park. There are a number of electricity and sewer wayleaves affecting the site. The Belfast Sewers Project, which is a major infrastructure project currently being undertaken by DRD Water Service, will effect part of the site being put forward for the proposed use as a stadium development.

Ormeau Park has a history of providing the people of Belfast with a base for recreational uses. The park is designated for recreational use and the ownership by Belfast City Council cannot change this. As such the parkland does not have any commercial value and therefore is ideal for stadium development. Unlike other Council owned sites that have commercial development potential, such as Maysfield, the Ormeau Park site cannot realise any substantial capital benefit to the City Council by a sale of the property. The Council are not donating a large commercial site for a stadium proposal, they are however enhancing the economic value of the city as a whole by permitting the development of a stadium on recreational land.

3. *Maysfield*

The Maysfield site is strategically located on one of the main approaches to Belfast City Centre, fronting East Bridge Street and adjoining Central Station and a number of major office, commercial and residential developments and is within walking distance of the city centre. The site, which is irregular in shape, comprises 4.29 acres (1.74 hectares). It has a frontage of about 100 metres to Mays Meadow with Central Station on one side and a modern apartment block at St. George's Harbour on the other side and over 200 metres of frontage to the Lagan walkway.

Until recently the site was utilised as a City Council Leisure Centre and provided a range of leisure facilities including sports halls, swimming pool, squash courts and a range of other leisure and ancillary facilities. A second

building, a two storey structure, constructed in 1993/94 as a Water Sports Centre / Boat House, exists to the south of the main leisure centre building, adjacent to the river. The remainder of the site contains roads, access and car parking spaces, an attractive water inlet on the river frontage and some residual open space alongside the riverside walk.

Vehicle and pedestrian access to the site from East Bridge Street is via Mays Meadow which in turn runs under East Bridge Street to link up with Lanyon Place. It is anticipated that a level of ground contamination may be evident on-site. The draft Belfast Metropolitan Area Plan designates this site as a “development opportunity site”. The site is within the City Centre core and close to a mixture of typical city centre uses, including Central Railway Station, offices, commercial buildings, car parks, hotels, bars, restaurants and residential accommodation.

4. North Foreshore

The site is located to the north of Belfast City Centre, on the North Foreshore of Belfast Lough. The site is bounded to the north and east by the Lough. The M2 motorway which is the main route leading to the north of the region lies to the west of the site. Duncrue Industrial Estate lying to the south of the site accommodates a wide range of retail, showroom, warehousing and office type activities. The total site comprises approximately 335 acres. The area identified as the potential site for the stadium development extends to approximately 22 acres. The site configuration for any proposed development will have to take account of adjoining land uses, infrastructure and access requirements and the master planning exercise currently being undertaken by Belfast City Council for the overall North Foreshore site.

The site at North Foreshore is a former landfill site. The disposal of industrial and domestic waste began on the site of the North Foreshore in 1973. In 1981 filling ceased in the southern area of the site. Tipping in the northern area ceased in 2006. Industrial/commercial development in the northern area of the site should be delayed for a period of 20 years after the cessation. Tipping in the southern area was completed about 20 years ago and this area has been surcharged to help stabilise the degree of settlement. However, construction costs are likely to be increased on account of the difficult ground conditions.

The area is highly accessible given its direct links at the Fortwilliam Interchange (400 metres to the West) to the M2 motorway and the Port of Belfast. Single access to the site is off Dargan Road which forms the main frontage to the site. Existing public transport provision in the area is currently poor. Currently the Belfast to Larne rail service operates adjacent to the M2 motorway. However, the motorway and railway line server the site, making pedestrian access difficult. The nearest rail halt is at Yorkgate and is beyond a reasonable walking distance to the site even if a suitable footway connection did exist.

In the draft BMAP the southern portion of the site is zoned for employment and industry and also identifies the area as being suitable for a park and ride scheme. The Regional Development Strategy for Northern Ireland has identified the North Foreshore area as a major gateway site and as an area of potential particularly for sports and leisure.

The Belfast Harbour Local Plan was prepared within the strategy set out in the Belfast Urban Area Plan. Within the Plan the North Foreshore is regarded as a valuable land resource which should be developed in an integrated manner for industrial, commercial, open space and nature conservation uses following the cessation of landfill operations. More specifically, within the Belfast North Foreshore Implementation Plan an area of approximately 53.5 hectares in the southern part of the site is identified for industrial/commercial use. In relation to the south eastern part of the site, use for waste management purposes have been given priority and detailed agreements have been reached with Arc 21 in relation to the use and management of waste management and recycling contracts.

6.4 Out-of-town Proposal: Maze/Long Kesh

The development of the Maze Prison site was considered under the Reinvestment and Reform Initiative (RRI). The objective was to create firstly a physical expression of the ongoing transformation from conflict to peace and, secondly an inclusive and shared resource for the whole community. The Masterplan scenarios included a multi-sports stadium, an International Centre for Conflict Transformation, a rural Excellence and Equestrian Zone, offices, hotel and leisure village, an Employment Zone and a Community Zone.

The multi-sports stadium proposed a capacity of about 42,000 spectators which would be used for gaelic sports, rugby and football in addition to open air concerts and other large events. It would also include:-

- Hotel, conference facilities and offices
- Training space
- Medical access and an education/learning centre
- Located on a podium with underground parking and service areas which would link the sports and leisure uses in a traffic free environment

Stadium plans were redesigned in November 2006 following consultation with the three sporting bodies to include 'incorporation of seating and standing flexibility into the stadium design process'. The intention is to have a capacity of 35,000 for soccer and rugby games. The stadium will be re-configured for GAA games with 5,000 seats being removed and up to 12,000 fans being permitted to stand as is the case at Croke Park, Dublin. The maximum capacity for GAA games will be 42,000.

The Masterplan principles included the promotion of a high quality mixed use development which could be phased over time, an inclusive and accessible

destination with public access to a diverse range of sporting and leisure facilities which would promote healthy living and the provision of new infrastructure including transport links, pedestrian and cycle ways, amenities and new facilities to serve existing and new residents.

A number of key principles underpin the delivery of the Masterplan. These include the importance of a comprehensive approach, the promotion of sustainable and innovative building technologies, the need to stimulate private sector investor confidence, the provision of new infrastructure, development and public realm proposals of the highest design quality and future management and maintenance of facilities and the public realm.

Preliminary capital cost estimates indicated that site preparation, services infrastructure and strategic site infrastructure costs represented 15.8% of total costs, transportation 27.7% and capital works projects including site parking represented 56.5%. The stadium, external works and pitches were estimated at approximately £100m (including design fees and contingencies) excluding infrastructure and car parking.

The Masterplan included a sensitivity analysis to assess the impact of sensitivities and the inclusion of construction inflation and optimum bias into the model increased the affordability gap. However, with the inclusion of land value inflation, some of the increase was off-set by increased land value, resulting in a net affordability gap of £317.7m (at March 2007 prices). The proposed development shown in the Masterplan would give rise to a funding gap which would need to be met by public sector investment. The affordability gap could potentially be reduced by a number of measures including leveraging private investment, increasing land values and land receipts or a reduction in the capital costs.

The Masterplan stated that the ability to construct residential units on the site in the period up to 2015 would be required as enabling development and would be fundamental to the viability of the scheme. If residential development were to be permitted post 2015 following plan review the affordability gap could be significantly reduced. The public sector would have a crucial initial role to play in facilitating development but the long-term success of the scheme would ultimately depend on the ability to attract private sector investment and development skills. This point is discussed further in Chapter 7.

The Masterplan stated that there were a range of potential delivery mechanisms including joint ventures, appointment of a single developer and forming a development company. It stated that a mix of private and public sector funding for this scheme is highly likely and that given the wide range of social and public policy objectives, a purely private sector funding solution is unlikely to represent value for money, whilst equally, there are purely commercial elements of the project which should not require public sector funding at all.

The Minister responsible for the project, David Hanson, stated in November 2006, that:

..... *“a decision on whether or not the stadium would go ahead would not be made until the end of 2007 with demolition of the existing Maze prison site to be completed in November 2007”.*

6.5 In-town Proposal: Durnien.com City of Belfast Stadium Limited

A summary of the Durnien.com, City of Belfast Stadium Limited proposed development indicates the following advantages, strengths and opportunities for Belfast

- The design proposals are significantly developed with stadium capacity at Phase 1 planned for 25,200 spectators with flexibility to increase capacity to 33,000 and 40,000 as future phases
- The proposal includes well developed and detailed leisure facility and Olympic sized pool facility integrated within the stadium
- The submission includes a detailed calculation of the projected capital cost of the project
- A detailed assessment of sources of funding required for the capital cost of the project has been made
- A detailed projection of annual revenue costs of the project have been calculated
- A detailed projection of sources of income for all elements of the development has been estimated
- Evidence of detailed research and consultation with potential users, sporting bodies, promoters and leisure/events based organizations by the developer indicates that the project is achievable
- The submission includes detailed proposals to integrate existing internal and external sporting facilities at Ormeau Park
- Completion of stadium development, including leisure facilities, were to be achieved by May 2009 and fit-out of office accommodation completed by August 2009 (although this programme will now be in delay)
- The multi-purpose sports stadium at Ormeau Park is stated as being financially viable and sustainable.

6.6 In town Proposal: Sheridan Millennium Limited

A summary of the Sheridan Millennium Limited proposed development indicates the following advantages, strengths and opportunities for Belfast

- The submission is from a local development company supported by local and international design consultants
- The developer has a track record of delivering large leisure and entertainment venues including the Odyssey Arena and Multiplex cinema (Bedford Street)
- The proposed concept of a leisure & entertainment quarter for the city which would include the Odyssey Arena and Titanic Visitor Attraction + Waterfront Hall and the stadium at Ormeau Park to produce a "string of pearls" to promote an extended tourist destination
- The proposal indicates an opportunity to realise operational savings through efficient use of staff & resources from the Odyssey arena to operate & manage the stadium facilities
- The preliminary programme indicates completion of the stadium and leisure centre by August 2011 (although this programme will now be in delay)
- To implement the proposals it is necessary to develop both the Ormeau and Maysfield sites to ensure financial viability and provide regeneration for the area

6.7 In-town Proposal: Kajima Urban Developments

A summary of the Kajima Urban Developments proposed development indicates the following advantages, strengths and opportunities for Belfast

- The developer is a major international construction and development company
- The developer has a track record of delivering large stadia projects including Washington Ballpark, San Francisco Giants Ballpark and Eagles Stadium Philadelphia
- The proposal includes an international stadium operator, Global Spectrum, to manage and operate the stadium facility
- The proposal is based upon the premise that it provides an opportunity to create an overall Masterplan and commercial framework for the area which will incorporate the Ormeau Park site

and the Maysfield site to strengthen connections both along the Lagan in a north south direction and along an east west axis through the Gasworks

6.8 In-town Proposal: Peter Hunter/Arup UK Sport

A further stadium development option was put forward to Belfast City Council in November 2005 by Peter B Hunter, OBE, Architect and Development Consultant, based upon a feasibility design concept drawn up by Arup Sport. The proposal developed the aspiration of the Laganside Study of 1987 for Maysfield and Ormeau Park to become major centres for training for excellence in Sport and to improve facilities and host major international games.

The proposal required the existing Maysfield site owned by Belfast City Council, land currently owned by the Northern Ireland Transport Holding Company and land owned by a third party. The total land assembly of the sites envisaged was approximately 10 acres. The proposal considered that Central Station, Maysfield and the surrounding area offered an opportunity to fuse infrastructure and major development and to create a memorable international destination at the heart of Belfast. The capacity of the stadium was to be 30,000. Two levels for access due to the elevation of East Bridge Street were proposed allowing easy servicing and connection with Lanyon Place and the Waterfront Hall.

The development proposal offered the opportunity to greatly enhance conference facilities as part of a wider range of entertainment. It was envisaged that connections to, through and across the Lagan would give greater purpose to the riverside walkways and the intended Lagan Bridge to Ormeau Park. The Maysfield site was considered a natural regeneration hub to stimulate new investment and extend the influence of Lanyon Place. The proposal considered the tightness of the overall site (some 10 acres) would use scarce city centre land to the maximum advantage. It was envisaged that only station parking would be needed and peripheral car parks around the city would be utilised during sporting events giving wider economic benefit. The prominence of an elevated stadium and surrounding development at Maysfield would provide a winning image in the competitive race for ensuring Belfast meets the Best City status.

6.9 Summary

This chapter has reviewed the historical context, examined the eligible out-of-town and in-town sites and considered the proposals for the development of multi-purpose sports stadium.

Analysis of the out-of-town proposal indicates that:-

- the objective of the Maze/Long Kesh development is to provide an internationally recognisable physical expression of the ongoing

transformation from conflict to peace and to provide an inclusive, shared resource as part of the Shared Future agenda for the people of the region and beyond

- it intends to promote a mixed use development of regional significance which would create a unique destination and offers the potential to participate in the London 2012 Olympics and Paralympic Games.
- the potential benefits of the development of the Maze/Long Kesh site could be significant for the region where an economically and environmentally viable high quality scheme could be developed.
- the project will continue to require a high level of support from key stakeholders (political parties, sporting bodies and the public) and will need to establish and demonstrate affordability and value for money.
- the project will require appropriate development and delivery options to be implemented with private sector partner(s) who are prepared to carry significant development risk.

Analysis of the in-town proposals indicate that:-

- The private sector has shown a willingness to engage with sporting bodies to determine their requirements and consider their needs within the development proposals.
- The developers have demonstrated their intention to invest in the development of a multi-purpose sports stadium in the regional capital.
- All development proposals emphasise the requirement for public finance to support the development (through grant funding, capital subsidy or the use of land at other locations) and indicate the opportunity and the need for a public-private partnership approach in securing a viable scheme. The greater the proportion of public sector financial commitment the greater the opportunity will be of leveraging a sizeable proportion of private sector investment in the in-town location.
- A multi-purpose sports stadium in Belfast will effectively be for the use of one, and potentially two of the sports bodies (IFA & IRFU). It would appear from the evidence available that the GAA have no immediate need to use another sports stadium in Belfast, or the province, given the standard, condition and capacity of Casement Park and Clones and there are localities within Belfast which the GAA would consider unacceptable to their organisation and gaelic sports supporters.
- Without the support of at least one of the sports bodies the evidence would suggest that a multi-sports stadium, with a minimum capacity of

25,000, within an in-town location, will not be financially or commercially viable or sustainable.

- At this point in time, none of the sporting bodies have given a firm commitment to any developer, but all three have signed up 'in principle' to the government-backed Maze/Long Kesh development.
- In the absence of detailed investigation the evidence would suggest that the demand does not exist within Northern Ireland to support and sustain more than one stadium development with a capacity greater than 25,000 either in-town, or out-of town.
- The level of public funding required for an in-town multi-purpose sports stadium at Ormeau Park as presented by the development proposals or an alternative city centre location will be significantly less than that required for the out-of-town development proposed at the Maze/Long Kesh which is significant at a time of restricted public expenditure growth. The detailed assumptions underpinning this assertion are set out in Section 7.5.
- Difficulties exist with delivery of a multi-purpose sports stadium at Ormeau Park in relation to obtaining planning approval, loss of amenity space, rerouting of new and existing services and provision of an appropriate transport infrastructure to support the stadium development to the programmes outlined within each of the development proposals.
- In support of an in-town multi-purpose sports stadium as optimum location there is a need to assess all potential eligible sites based on a carefully selected set of evaluation criteria to be applied in determining the most appropriate site to meet the needs of a major stadium development as highlighted in Chapters 2, 3 and 4 of the report.
- The optimum size of multi-purpose sports stadium will be determined by the respective positions and degree of buy-in by the relevant sports bodies.
- Developer proposals indicate that a stadium needs to be used frequently and at full capacity.
- Potential seating capacity ranges between 25,000 at the lower range to accommodate the spectator requirements of soccer and rugby (although this has been influenced by the requirements stated within Belfast City Council's Development Brief) and 42,000 and the higher end to accommodate the spectator requirements of GAA, one-off high demand soccer or rugby fixtures and 'mega' events.

- In the situation where more than one sport will be using the stadium facility the design needs to be adaptable in terms of pitch size and seating arrangements to suit the respective needs of the sport bodies.

7. 0. Key Findings and Recommendations

7.1 Introduction

This chapter draws on the key findings from chapter two, identification of a Global Best Practice Model for stadium location; chapter three, the empirical test of this model amongst key stakeholder sectors in Northern Ireland; chapter four, the essentials of a stadium business model drawn from stadium best practice in mainland UK; chapter five, a spatial analysis of essential infrastructure; and chapter six, an assessment of developer proposals.

7.2 Similarities of Northern Ireland to the Global Best Practice Model

All the criteria in the Global Best Practice Model (Figure 1), apply to a multi purpose sports stadium in Northern Ireland. That is, a multi purpose sports stadium in Northern Ireland can bring significant benefits in relation to key the criteria including:

- **Regeneration perspectives:** The potential to stimulate considerable regeneration of the surrounding area in which the stadium is located. Local private and commercial properties have the potential to refurbish and expand alongside a stadium and the local population can avail of the stadium facilities on a community basis.
- **Economic perspectives:** There is potential to generate huge economic gains from the regular amassment of large crowds of people using the facility and the holistic multiplicity of ancillary facilities. Industry sectors that would benefit from a multi-purpose sports stadium are tourism, hospitality, retail shops and restaurants, art and craft exhibits and a host of other amenities.
- **Infrastructure perspectives:** Regardless of where a stadium is located it will stimulate the development of surrounding infrastructure. A stadium will enhance existing infrastructure and eventually lead to improvements of this infrastructure for the benefit of the wider community.
- **Business perspectives:** The stadium offers the potential to create the critical mass for economic development and business growth. If Belfast is to stay competitive it needs to build upon the high value added sectors which will reinforce the strengths of the local economy. Sport and the leisure market are recognised as potential strengths in promoting economic competitiveness of the city and its regional impacts.

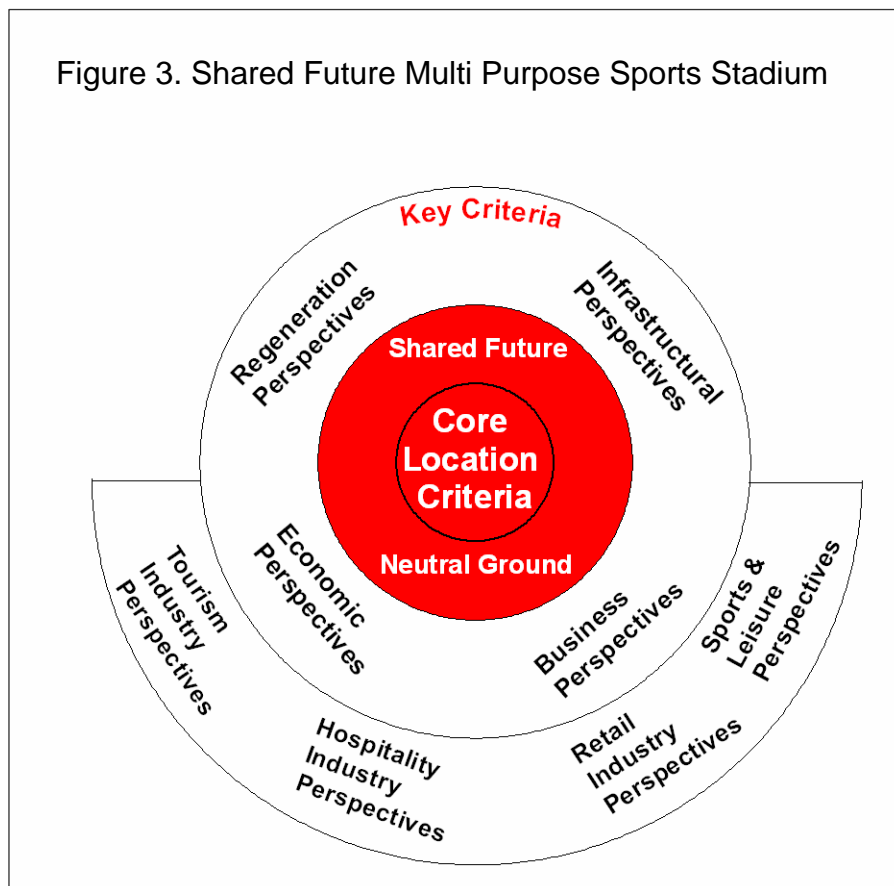
These key criteria are recognised worldwide in developing multi-purpose sports stadiums. They apply equally to Northern Ireland. So, global best practice as represented by the Holistic Multiplicity Model of Figure 1 applies in full to Northern Ireland.

7.3 Variances of Northern Ireland to the Holistic Multiplicity Model (Global Best Practice)

Key additional criteria to the worldwide Holistic Multiplicity Model (Global Best practice) are the core construct of a Shared Future. As stated earlier, this construct requires that all the people of Northern Ireland, regardless of community and cultural variances will benefit from enjoying amenities for all. All will belong to amenities in equality. This construct is supported by the four and three equation, that is, the four main political parties and the three main sports codes of Football, Rugby and Gaelic games.

A significant feature deriving from the Shared Future construct is that such a stadium is unlikely to be built in Belfast, simply because there are few, if any sites that would be acceptable as neutral ground for either the four political parties or the three sports codes. Therefore such a stadium construct must find neutral ground outside of the city. This neutral ground is deemed to be the Maze/Long Kesh site.

A Northern Ireland specific version of the Holistic Multiplicity Model would look like that depicted in Figure 3, which links with the perspectives developed in Chapter 2.



Clearly this does not adhere to the core underpinnings and drivers of the Global Best Practice Model. So, the economic and business criteria are greatly diminished in impact in that they cannot be maximised in an isolated site such as the Maze/Long Kesh. However, the trade off is a Shared Future stadium for all, assuming the Maze/Long Kesh site is ground neutral. A concern arises as to whether such a stadium location can be sustainable over time.

7.4 Optimum Location and Size

What size should a multi purpose sports stadium be? Stadium capacities vary from 20,000 seaters to massive monoliths of around 100,000 all seated icons. The general maxim for optimum size and use is, *“build it to fill it and use it frequently”*. Consequently, stadiums tend to reflect, in a broad sense, the critical mass of population surrounding them. In terms of proportionality the larger and denser the population, the greater the size a stadium can be. Exceptions to this are when stadiums are built for specific events, such as Olympic Games. Stadiums tend to be built in capital or regional capital cities. Therefore, taking account of the size of population in Northern Ireland, the core sports fans within this and the above maxim, it is likely that an optimum size of stadium would be between 20,000 and 30,000 seated spectators.

What are the crowd expectations when coming to a sports event? Within a stadium it is atmosphere, ambience and experience which are paramount; hence the *“build it to fill it”* aspect of the maxim again applies. However, users expect to experience much more than the sports event itself. Users expect a holistic multiplicity of facilities convenient to stadiums, especially restaurants and bars, accommodation, entertainment, general retailing and other ancillary attractions such as tourist sites, art and culture venues and so on. All of this should be broadly within walking distance of the stadium. This ancillary holistic multiplicity virtually dictates that stadiums are built in or near to city centres.

City centres provide multiple access points whereby stadium users arrive and leave from all points of the compass utilising a multiplicity of transport modes. Consequently, the inevitable initial congestion associated with large events is dispersed quickly and widely.

The economic viability of a stadium is greatly enhanced when it is located within a critical mass of population such as a city centre. Its convenience in terms of proximity ensures regular and frequent use. Large stadiums also create an iconic presence amongst a city population, whereby citizens have pride in belonging to a city with such an icon in its midst.

Taking cognisance of the best practice outlined above, it is clear that a new multi-purpose sports stadium for Belfast would be best situated in or near the city centre if it is to be both viable and sustainable. Given the criteria of the global best practice model, no other option should be considered.

The key criteria included in Figures 1 and 3 are represented in tabular format below to show how an in-town and out-of-town position can deliver potential maximisation on each criterion (Table 1).

Table 1: Capacity to deliver the Holistic Multiplicity Model: In-town versus Out-of-town

Key Criteria	In-town: Belfast City Centre	Out-of-town: Maze /Long Kesh
Regeneration impact	Existing	New
Economic impact	Maximised	Limited/minimal
Infrastructure Impact	Existing (but with substantial upgrading)	All new
Business impact	Maximised	Limited/minimal
Tourism potential	Maximised	Limited/minimal
Retail potential	Maximised	Limited/minimal
Hospitality potential	Maximised	Limited/minimal
Sport & Leisure potential	Maximised	Limited
Entertainment potential	Maximised	Limited/minimal
Community potential	Maximised	Limited
Buy-in of main political parties	Limited	Maximised
Buy-in of 3 sports codes	Limited	Maximised (but conditional)

The rationale that underpins the grading given to each of the key criteria as shown in Table 1 is as follows:

Regeneration: Belfast encapsulates the need for renewal and regeneration based on physical, social, economic and environmental improvements. There is a strong policy emphasis on the reuse of brownfield sites within the existing urban footprint to support the sustainability and the targeting of need towards deprived neighbourhoods such as the lower Ormeau Road area. The promotion of physical regeneration needs to be complemented by community development which contributes towards creating a city of mixed and diversified uses based on sustainable growth and economic development. Regeneration at the Maze/Long Kesh involves demolition of the old prison and new mixed use developments. The proposal will consist predominately of new development with little in which to regenerate.

Infrastructure: Good infrastructure is an integral part of modern city life. Increasing economic and social demands are raising the profile of city centres. The need for mobility and greater accessibility is placing greater need for an effective and efficient multi-modal transportation system and supporting infrastructure. Belfast lies at the heart of a regional transportation

network with linkages radiating out across the province through the Key Transportation Corridors. The infrastructural network is well established but clearly requires new investments given the increasing demands placed on a city which is the economic driver for the region. The location of new development needs to reinforce better integration between land use and transportation by building upon the existing infrastructure base of the city. At the Maze/Long Kesh, all new infrastructure development will be required.

Economic: Belfast's long term success depends on building its reputation as the economic engine for the region. This means attracting new development and investment opportunity and providing Belfast with the infrastructure to support the growing business base and attract new inward investment. This will depend on the quality of the product and in promoting high value-added activities based around tourism, leisure and sport.

Business: Clearly Belfast has in existence a well established and flourishing multiplicity of uses based on retail, accommodation, entertainment, bars, restaurants and other ancillary attractions. It is very difficult to manufacture these type of facilities on a new site outside of a city centre context and to ensure that the uses remain sustainable. In this regard the Maze/Long Kesh development has very little in the way of support infrastructure and will ultimately draw on the facilities offered elsewhere at Lisburn Town Centre, Sprucefield but most likely Belfast City Centre. However, such use will be much more limited.

Sports and Leisure Use: A Belfast site can provide immediate facilities for a multiplicity of local sports and leisure interests. Its central location is a convenience to all. The Maze/Long Kesh can also provide such facilities, but is not convenient to as many sports and leisure communities.

Four Political Parties: The Maze meets the Shared Future aspirations of the four main political parties. However, these parties must assess the trade off of the Shared Future against the financial implications of delivering on the above priorities and in making the development work in all its facets.

The Three Sports Codes: A Belfast site is not feasible for all three codes to share. However, each sports code must assess the benefits of the Maze/Long Kesh site against their own financial models and the preferences of their supporters.

Best practice throughout the world shows clearly that stadiums must be in or near city centres for viability and sustainability reasons. If an out-of-town location for a new multi purpose sports stadium for Northern Ireland is the preferred option, how will the constraint imposed by adherence to "A Shared Future" impact upon the funding and sustainability of such a facility?

7.5 Public Sector Contribution

Although the three Belfast developer bids are private sector led, there remains the issue of the extent of any public sector contribution to them. The same issue arises in respect of the Maze/Long Kesh project.

The Ormeau Park site earmarked for the stadium and its supporting facilities is approximately 20 acres in size. The Maze/Long Kesh site, as presented in the Masterplan, comprises 365 acres, of which 60 acres is designated for the sports stadium development. A tentative set of valuations of these two sites is set out in rows (i) to (ii) of Table 2 below. The valuation of the 20 acres at Ormeau Park is based upon a study, “Appraisal of Potential Options for the Replacement of Maysfield Leisure Centre” (Pricewaterhouse Coopers, 2004). This valuation of £3 million has been revised upwards in line with the increase in Belfast land values over the intervening period and reflects the reality that *“the current planning designation restricts the potential of this site (Ormeau Park) for other purposes”*. The estimated land costs per acre of the Maze/Long Kesh site are based on consultations with informed opinion and evidence of comparable site transactions. It is clear from Table 2 that the Ormeau Park site represents the smallest imputed public sector contribution and that the Maze/Long Kesh Stadium site represents the largest public sector imputed contribution.

Table 2: Estimated Valuation of Public Contribution to Sports Stadium Sites

Row	Site	Site acreage	Estimated cost per acre	Total site land value
(i)	Ormeau Park	20	na	£3m
(ii)	Maze/Long Kesh (1)	60	£1m	£60m
(iii)	Maze/Long Kesh (2)	365	£1m	£365m
(iv)	Maze/Long Kesh (3)	365	£1.5m	£547.5m

The Maze/Long Kesh project, however, involves the use of the entire 365 acre site, to include a multi-sports stadium, an International Centre for Conflict Transformation, a rural Excellence and Equestrian Zone, offices, hotel and leisure village, an Employment Zone and a Community Zone. The 365 acre site will be made available to the chosen private sector developer. Table 2 row (iii) also shows the valuation of the entire 365 acre Maze/Long Kesh site. If the entire Maze/Long Kesh site is valued as the public sector contribution to the project it amounts to several times greater than the Belfast site valuation.

It is understood that up to 200 houses could be built on the Maze/Long Kesh site under the Housing Growth Indicators of the RDS (DRD, 2001). The potential exists for up to 1000 houses to be constructed on the Maze site, by say 2012, if current planning restrictions were eased following a review of the RDS in 2010. Under this scenario, the site's value might be expected to rise significantly. Table 2 row (iv) also shows the effects of a 50% rise in the value of the site land. The upshot of this revision is that there is a significant

difference in the potential scale of public sector contribution to the Maze/Long Kesh and the Belfast stadium sites.

It is open to question whether the requirement to accommodate the 3 sports codes at a single sports stadium as implied under “A Shared Future” justifies such a potentially large contribution from the public purse at a time of mounting public expenditure constraint.

7.6 Key Recommendations

Based on the findings emerging from this research a number of key recommendations are suggested as follows:

- A new multi-purpose sports stadium should be embraced as a significant and valuable asset to the Northern Ireland economy and should be promoted as a catalyst for large-scale investment in infrastructure, tourism and cultural development.
- The determination of optimum location for a multi-purpose sports stadium should be based on the best practice model of holistic multiplicity which incorporates the totality of the experience, atmosphere, and facilities offered by the in-town location.
- The location of the stadium must ensure that it is accessible and attractive to the widest possible sporting and cultural audience.
- Government must ensure that the associated infrastructure is capable of supporting a multi-purpose sport stadium project of this scale.
- The final decision on location should be based on a pragmatic and objective strategic, regeneration, economic, infrastructure and business analysis; and should not be based on political considerations.
- Before a final decision is taken, the new Northern Ireland Assembly should ensure that the widest possible consultation is undertaken including transparency on a detailed analysis of the advantages and disadvantages of the in-town versus out-of-town locations and the reasons for selecting the chosen location.

7.7 Options on Way Forward for Belfast City Council

Reflecting on the above recommendations Belfast City Council should consider the following options. Option 1 is the preferred option but is dependent on resolving a number of challenging issues. If these issues prove irreconcilable then option 2 should be considered.

Option 1: Multi-purpose sports stadium in an in-town location at Ormeau Park

Chapter 6 provides details of the three proposals put forward by Durnien.com City of Belfast Stadium Limited, Sheridan Millennium Limited and Kajima Urban Developments. The summary of these development proposals indicates the advantages and opportunities associated with potential delivery of a multi-purpose sports stadium 'in-town' at Ormeau Park.

The delivery of a multi-purpose sports stadium at Ormeau Park may be achievable in the medium term if the following issues were to be addressed:-

- Developers secure the long term support of and legally binding agreements with one or more of the sporting bodies (IFA, IRFU and/or GAA) for the project.
- The proposed stadium development gains and maintains support of key stakeholders and local residents on the Ormeau Road, Ravenhill Road and surrounding areas.
- The preparation (following agreement with key stakeholders) of a detailed design brief to meet user requirements for issue to potential developers.
- A decision is made by Belfast City Council on the future use of the Maysfield site and clear direction is given as to its availability for developers to use for 'associated commercial development' to financially support the construction and operation of the stadium development at Ormeau Park
- The identification of an appropriate delivery mechanism (joint venture, appointment of a single developer, formation of a development company, etc) and consideration of an appropriate mix of public and private sector funding for development of a stadium
- Where deemed appropriate, the submission of a detailed Business Plan by each of the developers confirming construction development costs with sources of funding, stadium usage, and operational costs with sources of income.
- Where necessary, a commitment by Belfast City Council (or the public sector) to contribute funding to support the construction and/or operation of the stadium element of the project.
- A resolution of issues necessary for obtaining planning approval for the project (planning policies/statements, transport infrastructure, loss of amenity space, design quality, sustainable development, etc).

- Where necessary, commitment by Belfast City Council (or the public sector) to contribute funding to support the provision of footbridges/walkways/bridges across the River Lagan as part of appropriate transport infrastructure for a stadium development.
- A resolution of issues surrounding the positioning of a stadium within Ormeau Park and the potential requirement to seek agreement with the Department of Regional Development (DRD) and its advisors to re-route sewers and relocate shafts being constructed as part of the Belfast Sewer Project.

Option 2: Multi-purpose sports stadium on an in-town site based on holistic multiplicity criteria

Option 1 presents the issues that need to be addressed if Ormeau Park is progressed as the site for an in-town multi-purpose sports stadium. The findings of this report highlight the urgent need for a reassessment of the Maze/Long Kesh development proposals. The weight of evidence clearly indicates that an in-town location is the most sustainable for a multi-purpose stadium to serve the needs of Northern Ireland.

Under Option 2 this presents the opportunity for Belfast City Council to engage and develop a partnership with DCAL and SIB to progress a multi-purpose stadium together in Belfast for the benefit of the Province. This will involve considering alternative in-town sites. We use the term consider rather than 'reconsider' purposefully here, because the research team are not convinced that all alternative sites have been examined in sufficient detail. This would appear to be particularly so in relation to potential site considerations in the wider Titanic Quarter/Portlands area, the North Foreshore or at Maysfield.

Option 2 would involve a longer term timeframe but offers the advantages of undertaking a transparent site selection evaluation exercise which considers viability based on holistic multiplicity criteria rather than being constrained by the Shared Future agenda.

All of the bullet points in option 1, (with the exception of the final 2 bullet points) can be considered as applying to any in-town site under option 2.

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Appendix 1: List of Interviewees

The methodology underpinning this research involved a series of structured interviews and focus group discussions with key stakeholders. The interviewees consulted during the course of the research are categorised below by the association of their organisation.

Ref	Interviewee	Organisation
1	Roy Adair	Belfast Harbour Commissioners
2	Peter Aiken	Aiken Promotions
3	Kyle Alexander	Laganside Corporation
4	Tom Allen	MD Cadogan Holidays
5	Geoff Allister	DRD Roads Service
6	Brian Ambrose	Belfast City Airport
7	Kenny Archer	Journalist Irish News
8	Mervyn Black	Hall, Black, Douglas
9	Rowan Black	CE Greens Food Fare, Lisburn
10	Peter Boyle	CE Argento Ltd
11	Alan Bridle	Bank of Ireland
12	Frank Bryan	Chair Institute Of Directors
13	Paul Butler	Maze Panel SF
14	Alan Cardwell	TC &CE Carrickfergus BC
15	Peter Caldwell	Ostick Williams
16	Lee Campbell	Manager Myvan Ltd
17	Paul Carson	Strategic Planning
18	Simon Chadwick	Professor of Sports Marketing
19	Bernard Clarke	Research manager Translink
20	Pauric Coyle	Journalist BBC
21	John Cummins	DOE
22	Nuala Dalcz	Director of Marketing Carrickfergus BC
23	Conor Devine	BTW Shiels
24	Stephen Derymond	Colliers CRE
25	Mark Doherty	Belfast Harbour Commissioners
26	Anne Doherty	CE happening
27	Claire Donnelly	CE NI Tourism Industry Council

28	John Doran	Belfast International Airport
29	Alan Duckworth	MD Reebok Stadium, Bolton
30	Paul Durnien	Durnien.com
31	John Edmunds	CE John Edmunds Associates
32	Alan Ewart	CE Maze Panel DUP
33	Jim Fitzpatrick	Owner Irish News
34	David Gavaghan	Strategic Investment Board
35	Roger Gilpin	CE Steven Thompson Vita Cortex
36	Alistair Goode	CIM
37	Neil Gordon	Gordan's Chemists
38	Jim Gracey	Journalist SundayLife
39	Michael Graham	Farningham McCready
40	Carole Hall	Tourism Officer Carrickfergus BC
41	Andrew Hassard	Belfast City Council
42	Howard Hastings	CE Hastings Hotel Group
43	David Hitchens	MLA Mayor Carrickfergus BC
44	Lesley Holmes	Economic Development Belfast CC
45	Peter Holmes	Sheridan Millennium Ltd
46	Kevin Houston	MD HCL Technologies
47	David Hull	David Hull Promotions
48	Peter Hunter	Architect and Development Consultant
49	Gordon Irwin	Advisor to KUD
50	Edgar Jardine	DCAL
51	Sean Jarvis	Commercial Director Galphorm Stadium
52	Joanne Jennings	Belfast City Centre Management
53	John Laverty	Journalist Belfast Telegraph
54	Eamonn Loughery	Development Planning Partnership
55	Ciaran Mackel	Architect
56	Alan Maitland	OFMDFM
57	Karen Magill	Director Con of Passenger Transport NI
58	Michael Maguire	RD Chartered Institute of Marketing (CIM)
59	Janice McAleese	CE Ni Events Company
60	Ian McAlister	DOE
61	Raymond McCartney	MLA SF
62	Eamon Mc Cann	Wonderland Promotions
63	Christopher McCausland	McCausland Taxi Company

64	Tom McCourt	DRD Roads Service
65	John McCormick	Director of Development, Carrickfergus BC
66	Terry McDaid	MD First Trust Bank
67	John McGrillen	CE Downpatrick BC
68	David McNeilis	Lisney
69	Michael McQuillan	CE the Streat
70	Gerry Millar	Belfast City Council
71	Bill Morrison	Visiting Professor, University of Ulster
72	Rupert Moon	MD Cardiff Millennium Stadium
73	Robin Morton	Belfast Telegraph
74	Arthur Murphy	Sales & Marketing Manager P&O Ferries
75	Danny Murphy	Secretary, Ulster Council, GAA
76	Mark Neale	Maze Panel UUP
77	Noreen O'Loughlin	Development Manager BMCM
78	Peter O'Hagan	Maze Panel SDLP
79	Paul O'Toole	CE Tourism Ireland Ltd
80	Stephen Parks	CE Caribbean Resorts
81	Dave Pennick	President Belfast CC&T
82	Peter Quinn	Peter Quinn Consulting
83	Sir Desmond Rea	Chairman, PSNI
84	Mike Reid	CE Ulster Rugby
85	Francis Riley	MD Norwegian Cruise Lines
86	David Robinson	CE Robinson Cleaning
87	Victor Robinson	Architect/Planning Consultant
88	Michael Rowan	CE Frazers Ltd
89	Mike Smith	Titanic Quarter Ltd
90	Nigel Smyth	Regional Director CBI
91	Eileen Sung	OFMDFM
92	Gerard Steinberg	Chairman Oasis Retail Services
93	Giles Warrington	Dublin City University
94	Howard Wells	CE Irish Football Association (IFA)
95	Tony Whitehead	Strategic Investment Board
96	Bill Wolsey	Manager Beannchor (Merchant Hotel)
97	George Worthington	Pragma Planning
98	Geoff Wilson	Marketing Manager IFA
99	Paul Wilson	Director BTW Shiells

100	David Wright	CBRE
101	Nick Wrightman	MD Tapestry Collection
102	Barrie Todd	Todd Architects
103	Tracey Tsang	CIM
104	Various members	NILGA Planning Group
105	The Council	Northern Ireland Chamber of Commerce and Industry

Appendix 2: Quotes from Media Sources

Pro Maze	On the Fence	Pro Belfast
<p>‘The Maze is not a done deal ... so far a lot of the Belfast plans don’t stack up. It’s not about the location its about something of huge significance to the overall development of Northern Ireland’ <i>Edwin Poots May2007</i></p>	<p>‘I do not want a white elephant built’. <i>Ireland rugby legend’s second thoughts over Maze</i> <i>Trevor Ringland called for an open and honest debate on the location of a new national stadium. Sunday Life 6 May 2007</i></p>	<p>‘apart from the sporting and economic arguments in favour of locating the national stadium in the city , we believe that there would be considerable tourist advantages from such a decision’ <i>Northern Ireland Affairs Committee at Westminster.</i></p>
<p>‘the business case for the Maze will only be made public once a final agreement with the three sporting bodies on whether to go ahead with the stadium has been reached’’ <i>David Hanson in response to questions from Kate Hoey over the £4 million pounds spent to date on the Maze proposal. May 2007</i></p>	<p>‘Hastily made decisions are potentially reckless decisions. tens of millions of pounds from the public purse are at stake.... There can be no question of rushing through any plan of this nature’ <i>Ulster Unionist Deputy Leader Danny Kennedy, April 2007</i></p>	
<p>‘ I get asked a lot , if the stadium and all the other key developments are ever going to happen. The key issues of viability , value for money and affordability are currently being addressed and subject to Government successfully delivering a private development partner, then Northern Ireland can look forward to having a stadium it can be proud of’ <i>David Hanson January 2007</i></p>	<p>‘personally I don’t care where they plonk it as long as they build the damn thing’ <i>Jim Gracey Sports Editor Sunday Life April 2007</i></p>	<p>‘so why is anyone even contemplating going to the Maze? Where is the business case for it? Stadiums near city centres bring an atmosphere and a sense of occasion to a country where sporting events take place. Cardiff’s Millennium Stadium is a classic example’. <i>Kate Hoey MP April 2007</i></p>

		<p>‘so too with other costly projects like the Maze. Its promoters need to be more realistic as costly white elephants are an extravagance when there are more pressing demands from health and education’ <i>Tom Kelly March 2007</i></p>
<p>‘whoever becomes minister would have to look at it objectively... if Belfast City Council made a bid which addressed traffic and environmental issues that would have to be considered . The matter is still open but is coming to a conclusion’ <i>Edwin Poots April 2007</i></p>		<p>‘city stadiums create a wonderful atmosphere.... and it’s a great sense of occasion much more so I think than it will be when the new Wembley stadium opens because Wembley is in a suburb rather than a city centre ’ <i>Peter Hain Secretary of State March 2007 whilst talking about the Millennium Stadium Cardiff</i></p>
<p>‘I’m stepping back from favouring anything because of my new role . I will remain impartial, make a decision and then become an advocate of whatever is chosen’<i>Edwin Poots April 2007</i></p>		<p>‘can I point out to him (Hanson) that there is real concern not just among football supporters in Northern Ireland but among the wider community about the way the Maze project has been handled-the lack of transparency and accountabilty’ <i>Kate Hoey April 2007</i></p>
<p>‘Maze stadium has many fans’ <i>David Hanson MP April 2007</i></p>		<p>‘the plan to build a sports stadium on the site of the former Maze prison is one of the more hare -brained ideas to come out of Stormont in this generation’ <i>Eric Waugh April 2007</i></p>
<p>‘a Belfast Stadium would be nothing more than a sectarian stadium which will only cater for one section of the community</p> <p>‘Sinn Fein will not agree to plans to build any stadium until we get agreement to open up the jail as a visitor attraction’ <i>Paul Butler Vice</i></p>		<p>‘There’s a large body of opinion that believes that a stadium will only work commercially if it’s based in or near Belfast’ <i>Alasdair Mc Donald MLA</i></p>

<i>Chair April 2007 Maze Consultation Panel</i>		
‘certainly any new Northern Ireland stadium will need the infrastructure to allow those attending to enjoy the occasion and to have easy access. <i>Howard Wells IFA Chief Executive February 2007</i>		‘what makes the fans angry is that the only people who have been ignored in this grandiose scheme are the very people who will be paying to go there’ <i>Kate Hoey MP March 2007</i>
		Crues say No to the Maze. <i>Jim Semple Chairman Crusaders March 2007</i>
		‘when the government says they are going to spend multi- millions on a project, we should all be very concerned. When the government says it is really only prepared to spend money on one option to the exclusion of other options then we should be very worried indeed.’ <i>Neil Johnston Conservative Party Candidate March 2007</i>
		‘it is the simplest no- brainer ever that it should be in the city of Belfast where there is the infrastructure’ <i>Gerry Lennon CEO BVCB March 2007</i>
		‘Recent remarks by Hain that city centre stadiums provided a better atmosphere than their out of town counterparts should be the catalyst for a policy rethink’ <i>Dave Pennick Belfast Chamber of Trade and Commerce</i>
		‘the weight of the evidence that we heard in the committee was that stadiums around the world benefit tourism when they are located in a city centre’ <i>John Grogan MP Northern Ireland Affairs Committee Member March 2007</i>
		‘Think again, before it’s too late, about increased rates

		and water tax and forget the Maze Stadium/ museum nonsense' <i>Barry White February 2007</i>
		'..it needs to be sited where there are good transport links and the infrastructure is there to support it..... when the politicians, architects and lawyers move on it is the buying public who will vote with their feet.....there has been a move across the world to bring stadiums back into city centres' <i>Paul Sargeant Former Chief Executive Millennium Stadium Cardiff now General Manager of Sun Corp Stadium Brisbane February 2007</i>
		'well if anyone believes for half a second that the white elephant being imposed upon us by the SIB and David Hanson stands any chance of leaving such an imprint on the identity of this part of Ireland as Croke Park has in the south , they had better think again' <i>Brendan Mulgrew February 2007</i>
		'..to my mind , trying to get the three sports into one stadium is like trying to put square pegs into round holes' <i>Gary Mc Allister February 2007</i>
		'stadium should be in Belfast or not at all' Frank Bryan Chairman Institute of Directors, January 2007
		'The Belfast Chamber of Trade and Commerce is very clear that we regard the city of Belfast as the location which best suits the sporting and business needs of the city and indeed of Northern Ireland as a whole' <i>Gerald Steinberg President BCTC, February 2007</i>

Appendix 3: Sports User Questionnaire



This questionnaire is part of a research project being carried out by University of Ulster on behalf of Belfast City Council

Belfast Multi-Purpose Sports Stadium

The debate concerning the building of a multi-purpose sports stadium is well documented. To date no feasibility study has been carried out to determine the suitability of the Belfast proposal for a multi-purpose sports stadium. As a sports fan, we seek your views on a few specific points:

1. **Location** – The proposed location for the Belfast Stadium is in or near the City Centre, for example, Ormeau Park. Is this location acceptable to you?

- YES

If yes, please say why

-NO

If no, please say why

2. **Size** - What size of City Centre Stadium do you think would be best for your preferred sport?

- 20000
- 30000
- 40000
- Other (Please specify)

3. **Method of Travel** - How would you expect to travel to and from the City Centre Stadium?

- By car
- By public transport
- By car and public transport
- By car and walk
- By public transport and walk
- Other (Please specify).....

4. **Event Experience** – When attending a sports event what do you normally do?

- Go directly to and from the event
- Go for pre/post event drinks
- Go for a pre/post event meal
- Go for pre/post drinks and meal
- Other (Please specify)

5. Which **sport code** would you normally prefer to attend matches? (rank 1,2 or 3)

- Football
- GAA
- Rugby

Your anonymity is guaranteed, however, for the purposes of survey validity we ask you to provide your name and address below:

Name:

Address:

Post Code: