



THE STATE OF BASEBALL: PROFESSIONAL & HIGH-LEVEL AMATEUR

CITY OF EDMONTON

DRAFT REPORT
NOVEMBER 2014



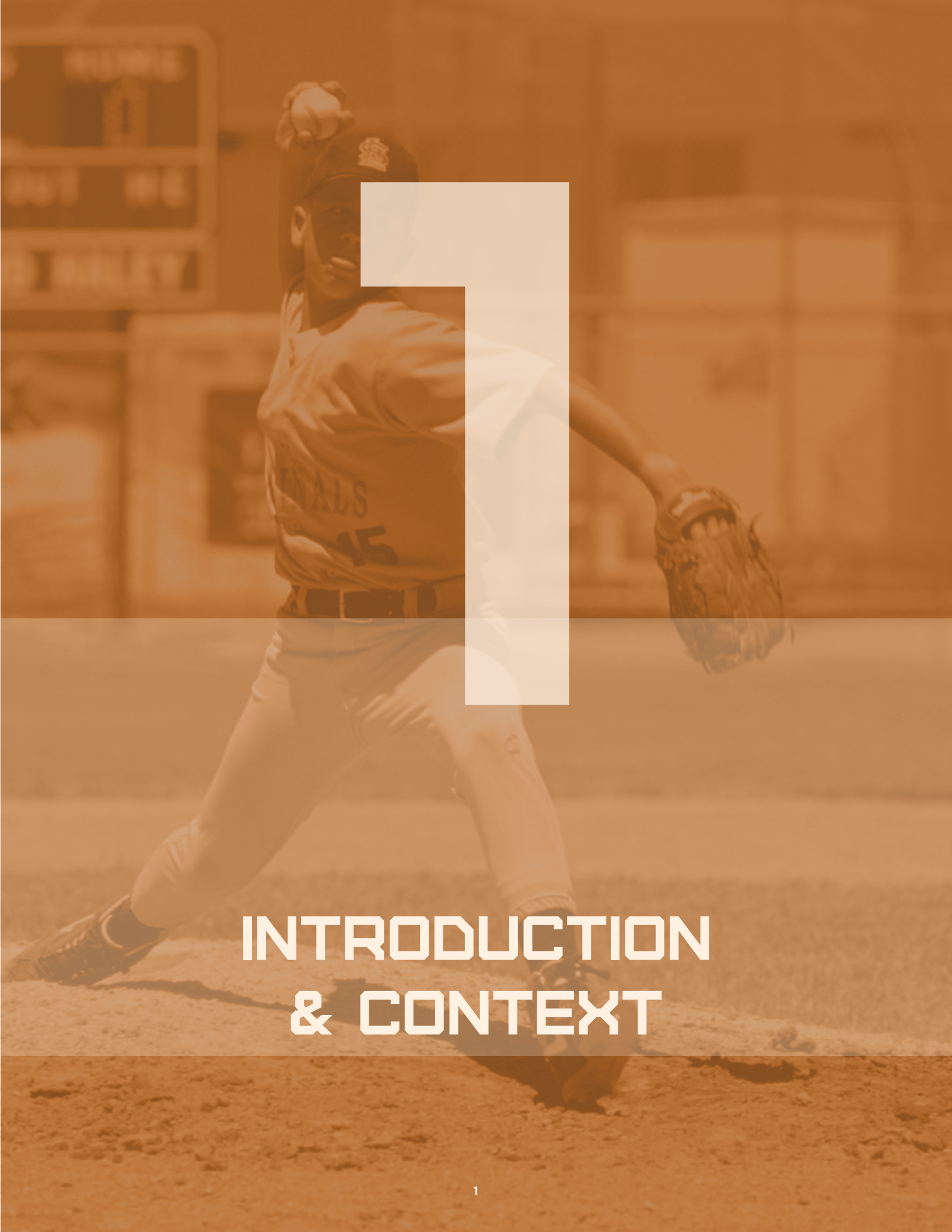


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INTRODUCTION & CONTEXT

The City of Edmonton has undertaken a project to assess the current state of professional and high level amateur baseball in the city. The project is necessary in order to help provide the City with information that can be used when making future planning decisions related to baseball. The successes of professional franchises such as the Trappers and baseball events hosted in the city are fondly regarded by Edmontonians. The City of Edmonton has, and continues to, play a significant role in baseball through the management of an estimated 575 community diamonds and support of the numerous baseball events that have been hosted in Edmonton. The City also continues to own Telus Field; a 10,000 seat baseball facility which is regarded by many as one of the best baseball specific venues in Canada.

While all levels of baseball are important and valued, this report is primarily looking at professional and high level amateur levels of baseball. A variety of primary and secondary research mechanisms were used to gather the information presented in the report. These included:

- In-person and phone interviews with local baseball stakeholders and officials;
- In-person and phone interviews with league and franchise operators in western North America;
- Analysis of available participation data; and
- Research into trends and issues facing professional baseball.

The information presented herein is intended to compliment previous strategic planning conducted by the City. Identified as follows are strategic plans and initiatives which help guide how the City delivers recreation and sport opportunities for residents. While these documents are not necessarily specific to baseball (or other specific sports) they include a number of broad based planning mechanisms and considerations which help the City make decisions on infrastructure, provision philosophies, and community partnerships.

- Edmonton Active Recreation and Sport Plan 2016 – 2026 (ongoing)
- Current State of Sport and Active Recreation (2011)
- The Way We Live: Edmonton's People Plan (2010)
- Artificial Turf Plan 2009 – 2015 (2009)
- Field Strategy 2005 – 2015 (2005)
- Recreation Facility Master Plan 2005 – 2015 (2005)

Related strategic planning conducted by other stakeholders

is also important to consider when assessing the current state and future needs for baseball. Planning documents with relevancy to the sport of baseball include:

- Going the Distance: The Alberta Sport Plan 2014-2024 (2014)
- Edmonton Sport Council 2014 – 2016 Strategic Plan (2014)
- The Canadian Sport Policy 2012 – 2022 (2012)
- Baseball Canada Strategic Plan 2010 – 2014 (2010)
- Canadian Sport for Life Policy





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THE BASEBALL LANDSCAPE IN EDMONTON

The following section presents a historical overview of professional and high level amateur baseball in Edmonton. An overview of available baseball participation data in the city and region is also provided.

THE HISTORY AND CURRENT STATUS OF PROFESSIONAL & HIGH LEVEL AMATEUR BASEBALL IN EDMONTON

Baseball has been an essential element in Edmonton's social and sporting fabric since its arrival in Edmonton in the late 1880's. Edmonton continues to be regarded for its strong baseball heritage and culture. Generations of Edmontonian's have enjoyed watching baseball in Edmonton's river valley over the years at venues such as Renfrew Park, John Ducey Park and Telus Field (all of these venues were located on the same site). Throughout the early twentieth century Edmonton teams competed in various Western Canadian leagues which included the Western International League. In 1957, Edmonton represented Canada at the Global World Series largely through the efforts of Edmonton's "Mr. Baseball" John Ducey.

Modern professional baseball came to Edmonton in 1981 with the arrival of the MLB affiliated Edmonton Trappers of the AAA Pacific Coast League. The Trappers played at John Ducey Park from 1981 to 1994 before moving into the newly redeveloped 10,000 seat Telus Field in 1995. During the Trappers 24 year existence (1981 – 2004) the franchise won six division titles, four Pacific Coast League Championships and played a key role in the development of numerous future Major League Baseball stars. Notable Trappers alumni include Ron Kittle, Devon White, Eric Chavez, Jim Edmonds, Justin Morneau, Tim Salmon, Johan Santana, Matt Stairs and Miguel

Tejada.

Edmonton's river valley has also hosted numerous national and international baseball events. Notable baseball events in Edmonton over the last 30 years have included the Intercontinental Cup (1981,1985); World Men's Championships (1990); Olympic Qualification Tournament for the Americas (1996); World Junior Championship (2000); World Cup of Women's Baseball (2004, 2014); and the World Junior AAA Championship (2008). Many of these events were made possible due to the work of the volunteer Edmonton International Baseball Foundation, which was founded and chaired by Ron Hayter.

After the departure of the Trappers in 2004 Telus Field has been home to brief stints of independent professional baseball. The Edmonton Cracker Cats played in the Northern League from 2005 to 2007 and the Golden Baseball League in 2008. The franchise was then sold to the Edmonton Oilers 2009 and renamed the Edmonton Capitals. The Capitals played two seasons in Golden League followed by one season in the Northern League. The Capitals won the Northern League Championship in 2012 before the league ceased operations at the end of the season.

COLLEGIATE & AMATEUR BASEBALL

Collegiate and competitive amateur baseball continue to have a growing profile in Edmonton. Over the past two summers (2013 and 2014) baseball fans in Edmonton have had the opportunity to watch the Edmonton Prospects at Telus Field. The Prospects play in the Western Major Baseball League (WMBL), a collegiate summer league with teams located in Alberta and Saskatchewan. In 2014 the Prospects drew 17,983 spectators to Telus Field for an average of 856 people per game. This attendance figure ranked third out of the eleven teams in the league as identified in the chart below.

TEAM	TOTAL	AUG.
Okotoks Dawgs	65,012	2,827
Edmonton Prospects	17,983	856
Lethbridge Bulls	18,009	819
Medicine Hat Mavericks	15,431	701
Regina Red Sox	10,365	451
Moose Jaw Miller Express	6,532	297
Yorkton Cardinals	5,120	269
Swift Current Indians	5,983	260
Melville Millionaires	4,553	217
Weyburn Beavers	3,736	187
Saskatoon Yellow Jackets	3,426	149
Total	156,150	653

The development of new baseball academy programs in the region is also attributed to the growing number of local players that are pursuing NCAA opportunities. Many of these players return to Canada in the summer months to play in the WMBL.

Canadian University baseball exists in some pockets of the country with current efforts being undertaken to explore expansion of University baseball on a more mainstream and comprehensive basis. The Canadian College Baseball Conference currently includes the University of Calgary, Vancouver Island Baseball Institute, Prairie Baseball Academy, Thompson River University and Okanagan College. The University of British Columbia also fields a team in the National Association of Intercollegiate Athletics.



BASEBALL PARTICIPATION LEVELS

While the focus of this report is primarily on professional and competitive amateur baseball, a review of overall ‘grassroots’ participation in baseball can help assess current interest levels and the overall health of the sport. Summarized as follows is an overview of participation data from a number of available sources.

BASEBALL ALBERTA

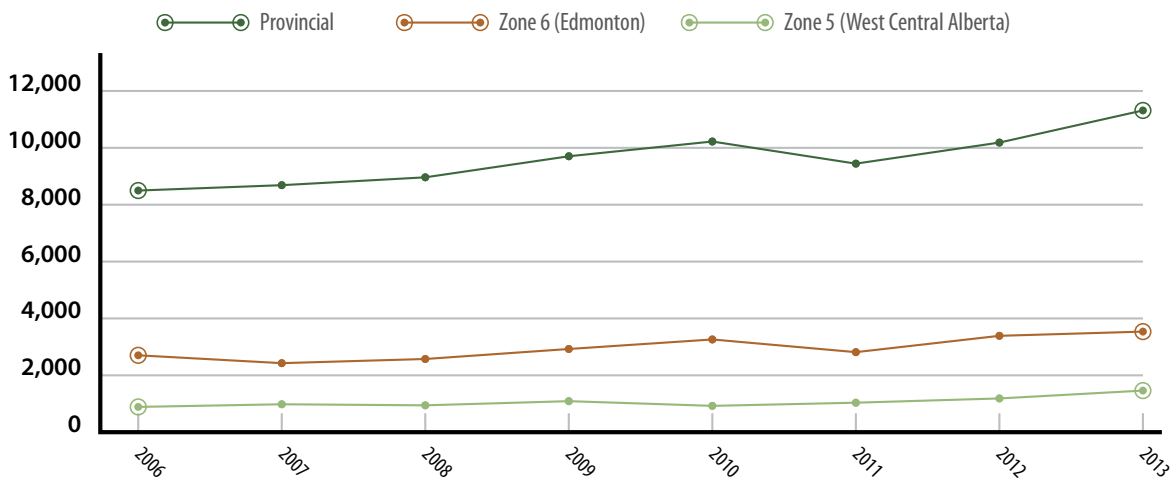
The following chart provides an overview of Baseball Alberta registration figures for the previous eight seasons (2006 – 2013). Accompanying the chart is a graph which illustrates overall fluctuations and growth patterns in minor baseball registration. As reflected in the chart and graph, minor baseball registration has experienced levels of growth

both provincially and in the Edmonton region. Since 2006, baseball registrations in Edmonton (Zone 6) have increased by 42% while overall provincial registrations have increased by 24%. Registration in Zone 5, which includes a number of communities adjacent to Edmonton have increased by 29%.¹

Minor Baseball Participation in Edmonton & North Central Alberta

	2006	2007	2008	2009	2010	2011	2012	2013
Provincial (Total)	8,390	9,042	9,184	9,772	10,274	9,434	10,138	11,092
Zone 6 (Edmonton)	754	801	808	858	899	1,012	1,110	1,291
Zone 5 (West Central Alberta)	2,723	2,672	2,920	3,221	3,571	3,266	3,683	3,813

Baseball Alberta Registrations



¹ Data provided by Baseball Alberta.

CITY OF EDMONTON CURRENT STATE OF SPORT AND ACTIVE RECREATION (2011)

Survey data published in the Current State of Sport and Active Recreation reflects that participation in baseball increased by 2% between 2008 and 2011 and ranks as the sixth most participated in sport among Edmontonians. Data collected also indicates that baseball participation in Edmonton is highest in the 18 to 24 and 25 to 44 age groups. See the following charts for a complete overview of the findings.

Top Sport Activities: 2008 & 2010

Table 1

SPORT [MENTIONS ABOVE 1%]	2008 [N = 483]	2010 [N = 577]
Soccer	31%	24%
Ice Hockey	18%	18%
Golf	11%	10%
Basketball	8%	10%
Volleyball	7%	9%
Baseball	6%	8%
Martial Arts	6%	4%
Swimming	8%	7%
Curling	6%	5%
Softball (Fast pitch/slo-pitch)	4%	4%
Ball Hockey	3%	4%
Football	2%	4%
Tennis	2%	3%

Top Ten Sport Activities (2010): By Age Segment (Years)

Table 2

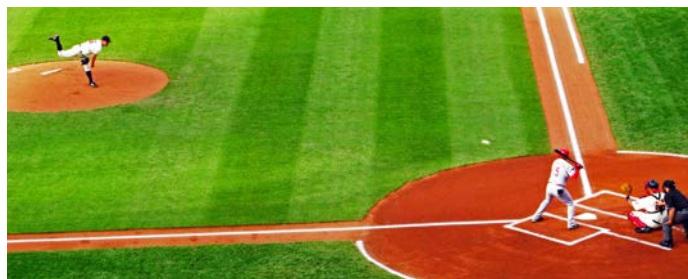
SPORT (TOP 10 MENTIONS)	UNDER 18 (N = 189)	18 - 24 (N = 81)	25 - 34 (N = 93)	35 - 44 (N = 84)	45 - 54 (N = 62)	55 - 64 (N = 26)	65+ (N = 31)
Soccer	41%	31%	26%	16%	11%	—	8%
Ice Hockey	18%	13%	19%	22%	29%	3%	12%
Golf	1%	3%	9%	12%	12%	33%	45%
Basketball	11%	25%	8%	7%	3%	3%	—
Volleyball	22%	7%	17%	7%	9%	6%	—
Swimming	13%	6%	4%	4%	—	8%	—
Baseball	3%	14%	11%	11%	12%	3%	—
Martial Arts	—	2%	3%	5%	2%	—	—
Curling	1%	2%	2%	6%	14%	13%	19%
Softball (fast pitch/slo-pitch)	1%	4%	13%	6%	2%	3%	3%



ALBERTA RECREATION SURVEY

The 2013 Alberta Recreation Survey found that 4.4% of respondents had participated in baseball / softball at least once in the previous year. The following chart provides an overview of historical findings from the previous four Alberta Recreation Surveys as well as sub-segment findings for Edmonton. As reflected in the chart, overall participation in baseball / softball appears to be declining. However it should be noted that the Alberta Recreation Survey does not record such characteristics as frequency or nature of participation. The decrease in overall participation for baseball / softball is also consistent with many other organized sports; reflecting an overall societal trend in physical activity participation and preferences (shift from structured sports to spontaneous use activities).

	2013	2008	2004	2000
Edmonton	N / A	7.1%	9.8%	14.1%
Alberta	4.4%	8.1%	11.0%	13.9%

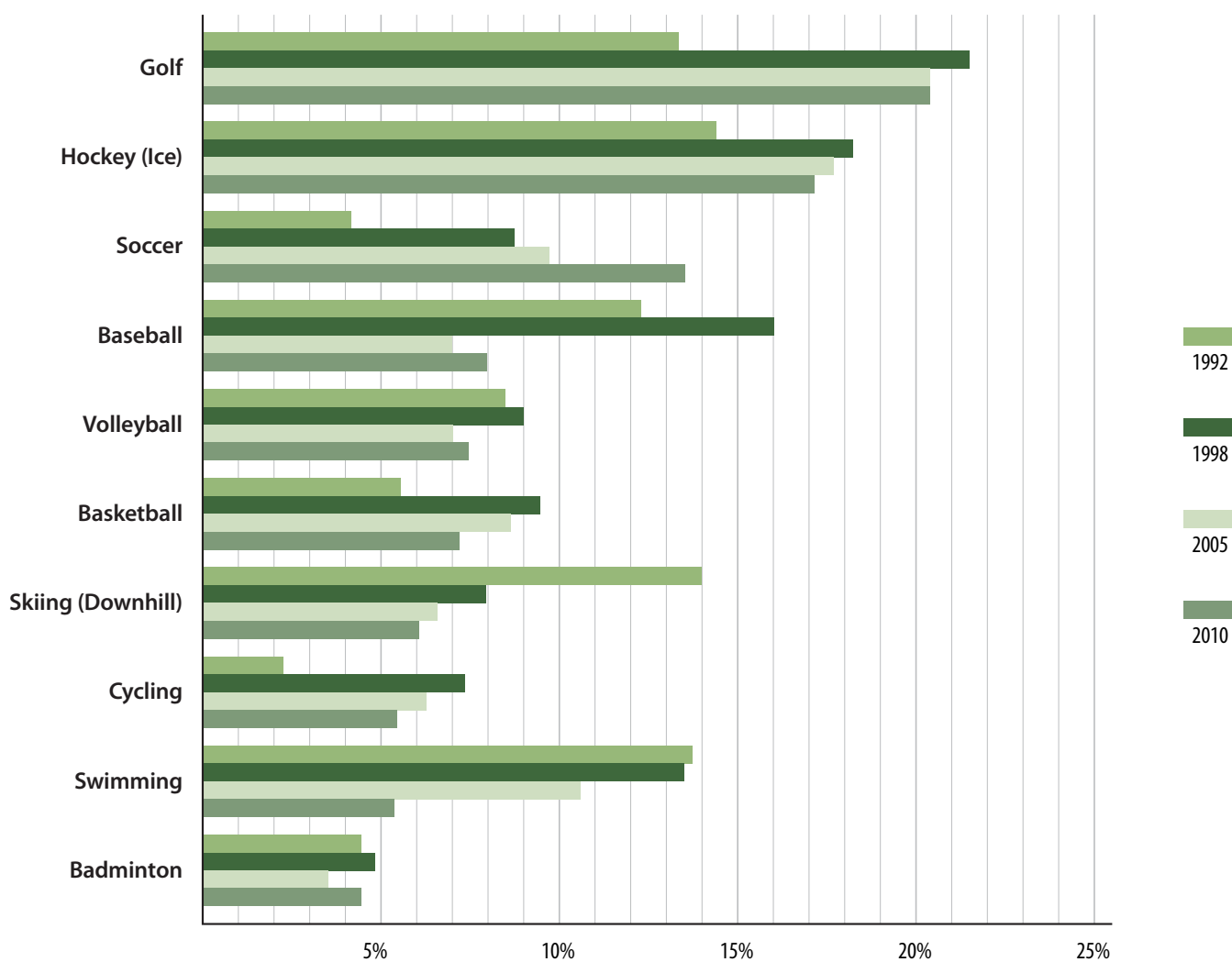


SPORT PARTICIPATION 2010 RESEARCH PAPER

A research paper published by Canadian Heritage entitled “Sport Participation 2010” reveals a number of findings related to active (regular) sport participation in Canada. The following chart² illustrates participation levels among Canadians aged 15 and older for the top ten sports in Canada. As reflected in the chart, 8% of Canadian sport participants play baseball which ranks fourth out of all organized sports.

Data from the research paper also reflects that baseball players have a high frequency of participation. Forty-seven percent (47%) of active baseball players participate in the sport on a weekly basis.

Active Participation Rate



² Chart from “Sport Participation 2010”.



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TRENDS & ISSUES

Professional baseball in North America is provided by both Major League Baseball affiliated and independent baseball leagues. The following section provides an overview of current trends and issues in professional baseball.

Included in the trends and issues analysis are pertinent trends related to infrastructure, current popularity of baseball, and challenges facing professional baseball operators.

OVERVIEW OF THE PROFESSIONAL BASEBALL LANDSCAPE

MAJOR LEAGUE BASEBALL (MLB) AFFILIATED PROFESSIONAL BASEBALL

Affiliated baseball leagues are those which operate under Major League Baseball. Affiliated minor league teams have agreements with Major League Baseball teams with the primary objective of developing players. Levels of affiliated baseball include Triple A (AAA), Double A (AA), Single A (A), and Rookie Ball.

Affiliated leagues must align with Major League Baseball which limits the number of teams in each league. The following leagues currently exist at each level of affiliated baseball.

AAA

Pacific Coast League

International League

AA

Eastern League

Southern League

Texas League

A

California League

Carolina League

Florida State League

Midwest League

South Atlantic League

New York - Penn League
(short season)

Northwest League
(short season)

ROOKIE BALL

Pioneer Baseball League

Appalachian League

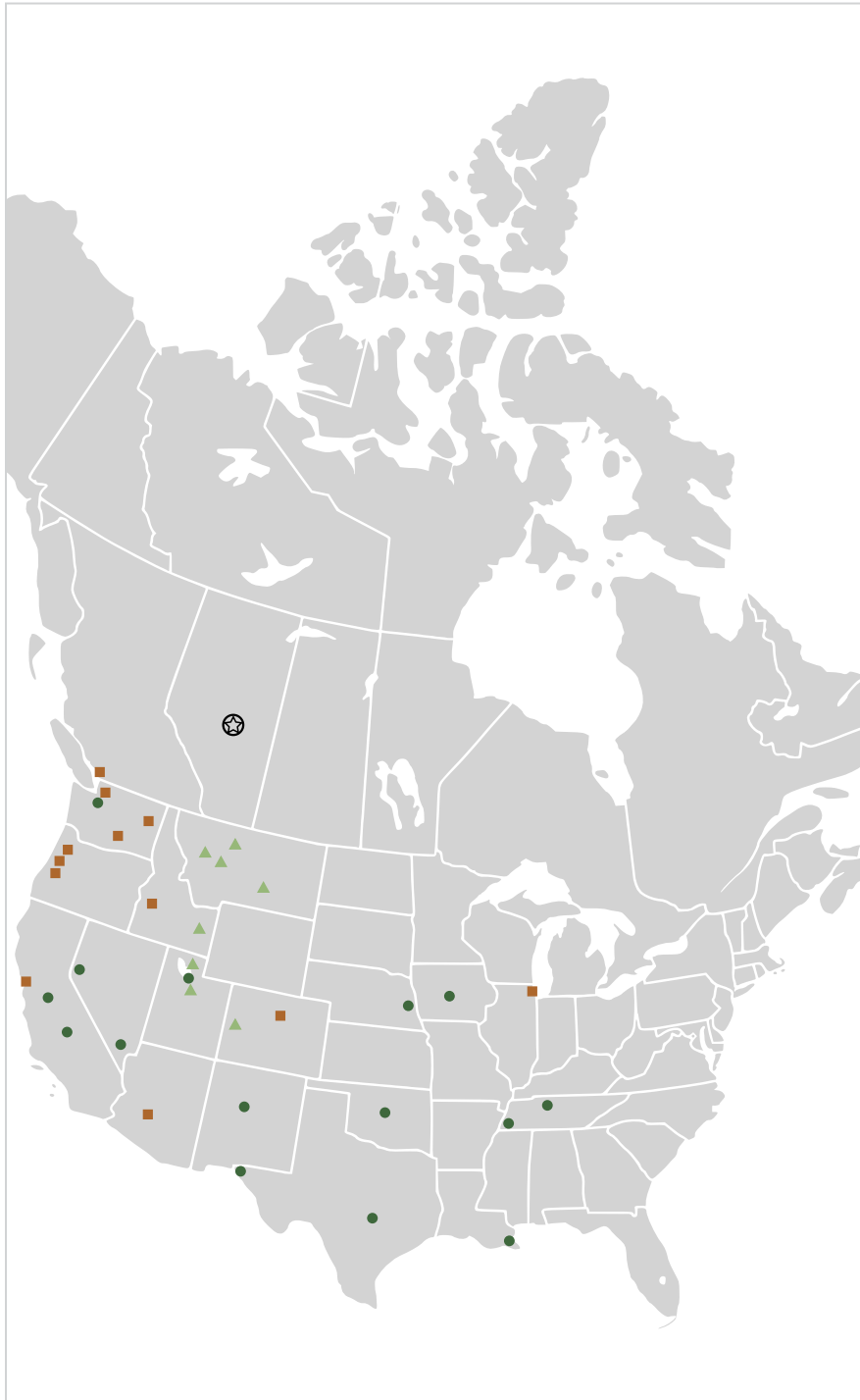
Arizona League





Gulf Coast League

Dominican Summer League

Venezuelan Summer League

The map on the following page shows the geographic location of teams in the three affiliated leagues with the closest proximity to Edmonton; the Pacific Coast League (AAA), Northwest League (A), and Pioneer League (Rookie).



-  **Edmonton**
-  **Pacific Coast League (AAA)**
-  **Northwest League (A)**
-  **Pioneer League (Rookie)**

Pacific Coast League (AAA)

Colorado Springs Sky Sox	Colorado Springs, Colorado
Iowa Cubs	Des Moines, Iowa
Oklahoma City RedHawks	Oklahoma City, Oklahoma
Omaha Storm Chasers	Papillion, Nebraska
Memphis Redbirds	Memphis, Tennessee
Nashville Sounds	Nashville, Tennessee
New Orleans Zephyrs	Metairie, Louisiana
Round Rock Express	Round Rock, Texas
Fresno Grizzlies	Fresno, California
Reno Aces	Reno, Nevada
Sacramento River Cats	West Sacramento, California
Tacoma Rainiers	Tacoma, Washington
Albuquerque Isotopes	Albuquerque, New Mexico
El Paso Chihuahuas	El Paso, Texas
Las Vegas 51s	Las Vegas, Nevada
Salt Lake Bees	Salt Lake City, Utah

Northwest League (A)

Everett AquaSox	Everett, Washington
Spokane Indians	Spokane, Washington
Tri-City Dust Devils	Pasco, Washington
Vancouver Canadians	Vancouver, British Columbia
Boise Hawks	Boise, Idaho
Eugene Emeralds	Eugene, Oregon
Hillsboro Hops	Hillsboro, Oregon
Salem-Keizer Volcanoes	Keizer, Oregon
Colorado Rockies	Denver, Colorado
Chicago Cubs	Chicago, Illinois
Arizona Diamondbacks	Phoenix, Arizona
San Francisco Giants	San Francisco, California

Pioneer League (Rookie)

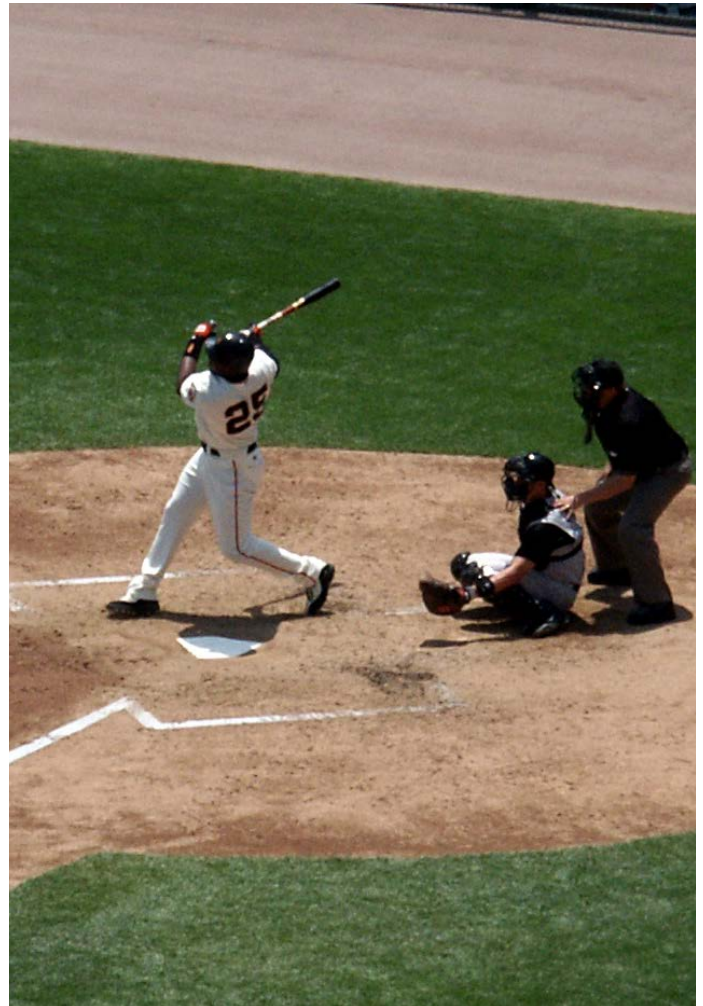
Billings Mustangs	Billings, Montana
Great Falls Voyagers	Great Falls, Montana
Helena Brewers	Helena, Montana
Missoula Osprey	Missoula, Montana
Grand Junction Rockies	Grand Junction, Colorado
Idaho Falls Chukars	Idaho Falls, Idaho
Ogden Raptors	Ogden, Utah
Orem Owlz	Orem, Utah

INDEPENDENT PROFESSIONAL BASEBALL

A number of independent professional baseball leagues exist within North America. Independent leagues have no formal affiliation with Major League Baseball. Teams in independent baseball do not operate under the same development oriented model as MLB affiliated teams; however instances do occur of players moving between affiliated and non-affiliated baseball. Current independent professional leagues in North America include:

- Atlantic League of Professional Baseball
- American Association of Independent Professional Baseball
- Canadian American Association of Professional Baseball (Can-Am League)
- Freedom Pro Baseball League
- Frontier League
- Pacific Association
- Pecos League
- United Baseball League

The following map illustrated current cities with teams in the American Association of Independent Professional Baseball and the Can-Am League.





American Association of Independent Professional Baseball

Amarillo Sox	Amarillo, Texas
Fargo-Moorhead RedHawks	Fargo, North Dakota
Gary SouthShore RailCats	Gary, Indiana
Grand Prairie AirHogs	Grand Prairie, Texas
Kansas City T-Bones	Kansas City, Kansas
Laredo Lemurs	Laredo, Texas
Lincoln Saltdogs	Lincoln, Nebraska
Sioux City Explorers	Sioux City, Iowa
Sioux Falls Canaries	Sioux Falls, South Dakota
St. Paul Saints	St. Paul, Minnesota
Wichita Wingnuts	Wichita, Kansas
Winnipeg Goldeyes	Winnipeg, Manitoba

Canadian American Association of Professional Baseball (Can-Am League)

New Jersey Jackals	Little Falls, New Jersey
Ottawa Champions	Ottawa, Ontario
Québec Capitales	Québec City, Quebec
Rockland Boulders	Ramapo, New York
Trois-Rivières Aigles	Trois-Rivières, Quebec

 Edmonton

 American Association of Independent Professional Baseball

 Canadian American Association of Professional Baseball (Can-Am League)

POPULARITY OF PROFESSIONAL BASEBALL

The continued popularity of professional baseball as a spectator sport and entertainment product is reflected in the consistent attendance figures of many leagues across North America. Major League Baseball attendance has historically experienced numerous fluctuations which is attributed by many to past work stoppages and other societal factors. In recent years attendance has stabilized around an approximate average of 73 million spectators per season which reflects growth of over 30% from the mid 1990's.³

Assessing and analyzing the popularity of independent professional levels of baseball can be more difficult. This is especially true for many independent baseball leagues as franchises are often less stable and the number of teams within a league can vary from season to season. Available data for number of leagues, MLB affiliated and independent

professional baseball reflects that minor professional baseball is relatively strong in many markets and regions. The following chart identifies attendance figures for the Pacific Coast League (AAA), American Association of Independent Professional Baseball (Independent), Can-Am League (Independent), Northwest League (A), and Pioneer League (Rookie). Average attendance for all four leagues over the past five years has remained relatively similar with small variations from year to year. Fluctuations in overall attendance in the American Association are largely attributed to expansions and subtraction, or relocation, of a select number of teams within the league over the previous five seasons.

Minor Professional Baseball Attendance

	2014		2013		2012		2011		2010	
	TOTAL	AVERAGE	TOTAL	AVERAGE	TOTAL	AVERAGE	TOTAL	AVERAGE	TOTAL	AVERAGE
Pacific Coast League (AAA, MLB Affiliated)	7,001,658	6,270	6,763,683	6,036	6,796,157	6,033	6,925,290	6,152	7,032,545	6,306
Northwest League (A, MLB Affiliated)	981,774	3,271	984,432	3,287	896,781	2,982	913,986	3,007	885,025	23,546
Pioneer League (Rookie, MLB Affiliated)	623,031	2,151	673,124	2,286	659,052	2,327	670,886	2,226	650,389	2,178
American Association of Independent Professional Baseball (Independent)	1,885,998	3,332	2,150,031	3,435	2,241,510	3,508	2,162,269	3,152	1,227,518	2,692
Can-Am League (Independent)	416,654	2,328	453,453	1,972	494,698	2,087	627,113	1,850	523,894	1,977

3 Forbes Magazine.

CHALLENGES FACING PROFESSIONAL BASEBALL

Professional baseball operators at the various levels face a number of challenges that have an impact on operations, success and overall viability. Challenges faced by professional baseball operators across North America include:

TRAVEL COSTS

Remain one of the critical factors that influences viability and success of a league. In fact, the vast number of professional leagues in North America is due in large part to operators trying to reduce travel costs by creating leagues that are geographically convenient and efficient.

WEATHER

As with any outdoor sport weather and climate heavily impacts gate revenues. This has resulted in many northern markets being viewed as better fits for short season leagues. The player development focus of affiliated baseball has further impacted the placement of franchises in various markets and leagues as MLB franchises want to ensure that players have optimal conditions and season lengths.

ECONOMIC FACTORS

Professional sports, including baseball, are heavily impacted by the local economies in the markets that they operate in. Professional baseball at the minor league levels are primarily gate driven with some additional revenues procured through sponsorships and advertising. Downturns in the local economy can have a significant impact, and in some cases put the future of a franchise or league into question.

LEAGUE STABILITY

Issues with league stability and viability have mostly been associated with independent professional baseball in recent years. While a number of strong leagues exist within independent professional baseball there has also been a number of upstart leagues that have come and gone. The fallout from leagues “going under” can be profound and tarnish the reputation of both independent and professional baseball. In many cases, leagues that fail have a select number of strong franchises which are left to either find another league to join or cease operations.

FACILITIES

In order for many professional baseball franchises to be successful it is necessary for the operator to find a suitable venue that is obtainable, available at a low cost, and with the ability to generate revenues which can sustain franchise operations. Municipalities are often expected or sometimes pressured to develop or assist in the funding for such venues. While many examples exist of long standing and mutually beneficial partnerships that exist between the local municipality and franchise operator the potential for conflict also exists.

MARKET SATURATION

MLB affiliated baseball alone accounts for 160 teams, with 120 operating on a full-time basis. Include independent and college teams and the North American market could have as many as 300 teams. While the situation is less crowded in Canada, many professional baseball franchises have to compete in a crowded marketplace with other professional sports and entertainment products for disposable income dollars.

BASEBALL STADIUM & INFRASTRUCTURE TRENDS

A number of trends and best practices have been observed in the development and operations of professional baseball stadiums across North America.

DEDICATED VENUES

In the 1960's and 1970's there was a trend towards building multi-purpose spectator venues that could accommodate a number of outdoor pursuits (e.g. soccer and baseball). However, over the last two decades there has been a movement back towards building dedicated and specifically purposed outdoor sport venues. This trend is being driven by a number of factors which include increased patron expectations of the in-game experience (which is often better accomplished at dedicated venues), lower operating costs and the movement towards creating multi-facility sporting districts or "hubs" of multiple facilities. This trend is occurring in many minor professional league markets with many communities now building separate 5,000 – 15,000 seat stadiums for their baseball and soccer franchises.

RETRO PARKS

Often attributed to the development of Camden Yards in Baltimore, a dramatic shift has occurred in baseball stadium development over the past two decades towards creating stadiums with a classic or vintage feel. This trend has influenced the development of numerous major and minor league baseball stadium designs. Many stadiums are now integrated into old warehouse districts or downtown areas and have often proven to be the catalyst for redevelopment of certain areas.

GROUP SPECTATOR / ENTERTAINMENT AREAS

Another trend observed in recent years is to create group seating and viewing areas, often at the expense of traditional seating capacity. These areas can include BBQ facilities, kids play areas, and other socially focused amenities which provide spectators with an enhanced experience. In many instances, creating these spaces has also been effective in generating additional revenue and attracting non-traditional fans to the ballpark.

BASEBALL DISTRICTS

Similar to the trend of creating dedicated venues and retro parks, the philosophy of how and where stadiums are built has shifted dramatically. In the past priority was given to considerations such as mass vehicular access. Stadiums were often developed away from core neighborhoods along major road transportation routes. However in recent years sporting venues, including baseball stadiums, are increasingly being integrated into core neighborhoods. In many instances sporting facility districts are among the most in-demand neighborhoods in which to live and the move towards retro style ball parks has further made baseball stadiums a natural fit for many urban neighborhoods.

Numerous examples exist of these baseball districts across North America. Winnipeg's Shaw Park provides one such example of how the development of a facility can create an attractive and vibrant district centered around an outdoor baseball venue. The development of Shaw Park was a key driver in the redevelopment of The Forks neighborhood, which has since become of Winnipeg's most attractive and in-demand core communities. Another successful example is of how a city has leveraged the attractiveness of a baseball stadium is the Parkside District in Birmingham, Alabama. The Parkside District neighborhood is a new residentially focused development area which has been largely centered around the 8,500 seat Regions Field baseball stadium. The venue opened in 2013 as a focal point and 'hub' for the neighborhood.



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COMPARATIVE ANALYSIS

A review of the baseball landscape in other Canadian cities was undertaken. As reflected in this section, many of these municipalities have faced similar challenges, opportunities, and decisions with regards to professional baseball infrastructure and franchises.

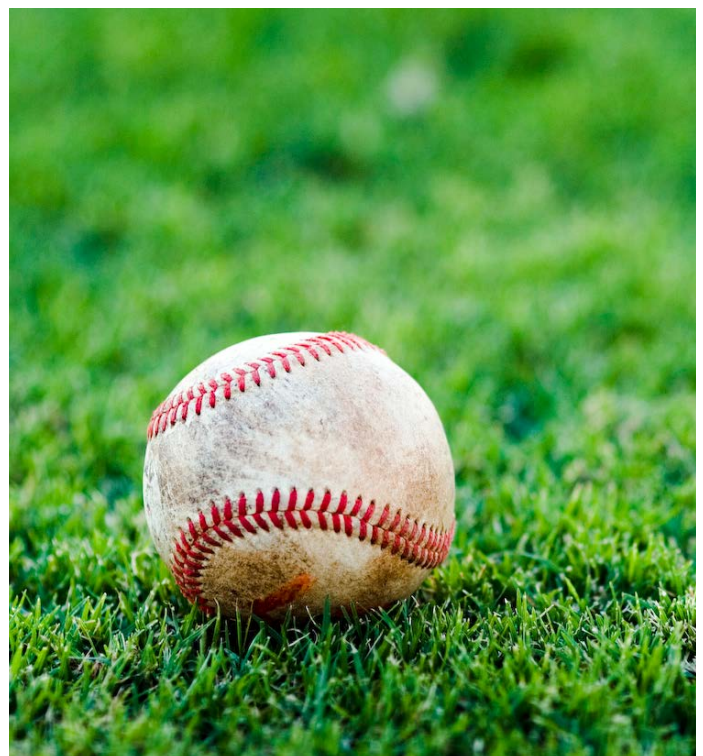
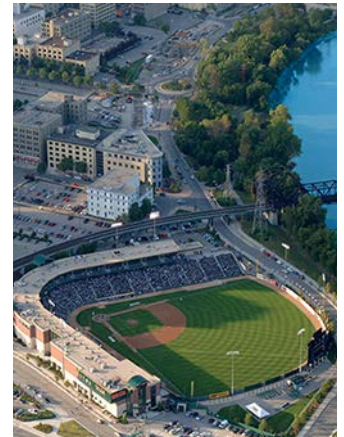
WINNIPEG

The Winnipeg Goldeyes of the American Association of Independent Professional Baseball remain one of independent baseball's most successful franchises. The Goldeyes drew 258,429 fans during the 2014 regular season for an average of 5,618 fans per game. As reflected in the following chart, the Goldeyes have consistently led the American Association of Independent Professional Baseball in attendance.

SEASON	AVERAGE ATTENDANCE	LEAGUE RANKING
2014	5,618	1
2013	5,880	1
2012	5,705	1
2011	5,740	1
2010	5,064	1

The Goldeyes play out of Shaw Park which is located in downtown Winnipeg near The Forks re-development area. The facility opened in 1999 and seats 7,481 spectators for baseball. Capital funding for the facility was provided by all three levels of government and the private sector. The facility served as a key venue for the XII Pan-Am Games. The facility also includes corporate suites (30), group function areas, a signature grass overflow seating area and is adjacent to numerous restaurants. In addition to baseball events the facility is utilized on a regular basis for concerts and other community events.

Shaw Park is operated by the Goldeyes. The club books the facility and is responsible for up-keep and non-baseball events.



OTTAWA

Similar to Edmonton, Ottawa's professional baseball history includes the previous existence of a Triple A franchise and recent experiences with independent professional baseball. The Ottawa Lynx Triple A franchise existed in Ottawa for 15 seasons from 1993 to 2007. The Lynx played in the International League and had a long standing (9 season) affiliation with the Montreal Expos as well as the Philadelphia Phillies and Baltimore Orioles. The Lynx played at Ottawa Baseball Stadium (opened in 1993).

In the years following the departure of the Lynx a number of efforts have been undertaken to bring MLB affiliated baseball back to Ottawa. However a 2013 cost analysis conducted by the City of Ottawa recommended that the City pursue independent professional baseball through the Can-Am league due to the lower cost of stadium renovations and ongoing operational subsidy. The costs associated with renovating Ottawa Stadium to make it suitable for affiliated AA baseball were estimated at \$40 million.⁴ The Can-Am League previously had a franchise in Ottawa for the 2008 season. Ottawa Baseball Stadium was also home to a professional franchise, the Fat Cats, for the 2010 and 2011 seasons.

The expansion Ottawa Champions of the Can-Am League are scheduled to begin play in 2015. A lease agreement for the Ottawa Baseball Stadium was struck between the City and Inside the Park, LLC (owner of the independent Canadian American Association of Independent Professional Baseball) with a clause allowing the League to transfer the lease to a suitable owner once one is procured. Terms of the agreement include:

- Base rent annually for the term of the agreement (2015 – 2024)
- Additional rent payment representing operating cost recovery on an annual basis.
- In return for the additional rent payment, the City will conduct all maintenance of the non-exclusive portions of the Stadium. Maintenance of exclusive areas remains the responsibility of the League.
- League will control all parking stalls at the Stadium on Event Days. The City is paid a surcharge for each paid parking attendee.
- Stadium seating area, field, and concourse areas are leased on a non-exclusive basis. The City retains the ability to lease or program the Stadium on all non-Event Days.
- The League is permitted to negotiate the sale of a naming rights package for the Stadium subject to City approval of the location and terms of the agreement. The City is to be paid a set percentage of the sponsorship's value.



⁴ <http://www.ottawacitizen.com/sports/Ottawa+Double+baseball+dream+dead/8954160/story.html>

CALGARY

The Calgary Cannons played in the MLB Affiliated AAA Pacific Coast League for 18 seasons from 1985 – 2002. Following the departure of the Cannons franchise Calgary has experienced difficulty in sustaining professional baseball. The Calgary Outlaws were formed in 2003 and played in the independent Canadian Baseball League, which folded shortly after mid-season. The Calgary Vipers played in three different leagues (Northern League, Golden Baseball League, North American League) during their existence from 2005 to 2011. The Calgary Dawgs of the summer collegiate Western Major Baseball League also played in Calgary from 2003 to 2005 before relocating to a new stadium in the nearby suburb of Okotoks.

All of the previously mentioned franchises played at Foothills Stadium, located adjacent to McMahon Stadium near the University of Calgary. Foothills Stadium was opened in 1966 with a number of renovations and additions taking place throughout the history of the facility. The current capacity of the facility is estimated at approximately 6,000 seats. The facility is currently utilized by the University of Calgary Baseball Club and minor amateur baseball. In recent years City administration has debated the future of the aging structure due to its current condition and perceived lack of utilization. Condition and lack of modern amenities at the facility was identified as an issue dating back to 1990's when the Cannons were the primary tenant. These issues remain a concern at the venue.

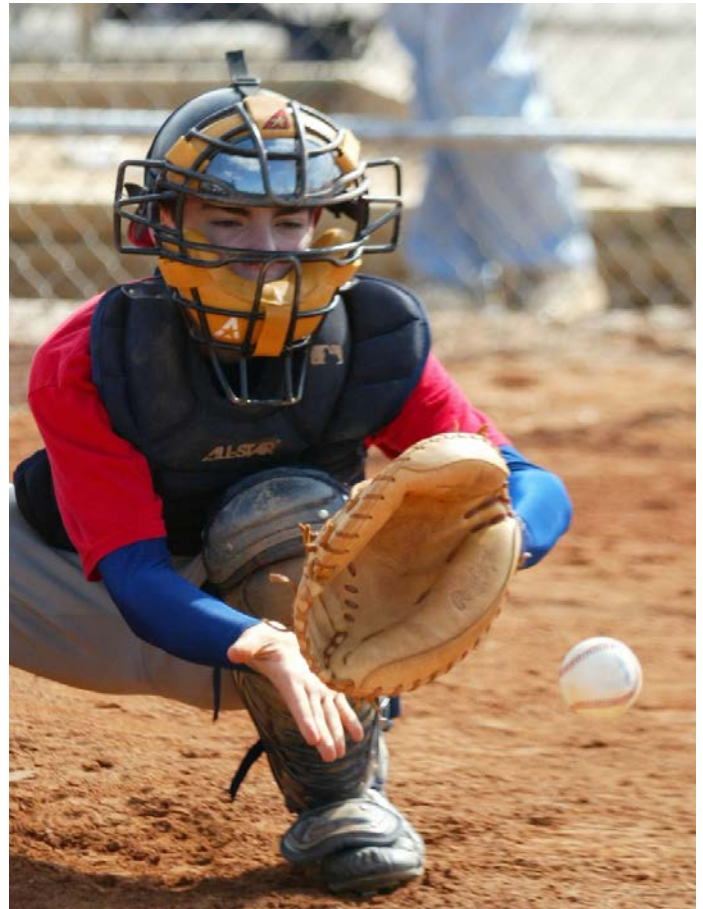


VANCOUVER

Similar to Calgary and Edmonton, Vancouver was home to an MLB Affiliated AAA Pacific Coast League franchise for a number of years from 1978 to 1999. After the departure of the Triple A Vancouver Canadians franchise in 1999 the city was able to secure a short-season Single-A franchise in the Northwest League. The current Canadians franchise continues to play at Nat Bailey Stadium and has been affiliated with the Toronto Blue Jays since 2011. The franchise leases the facility from the city. Attendance for the Canadians has consistently been near the top of the eight team league as reflected in the following chart. The Canadians are owned and operated by the Vancouver Professional Baseball Partnership.

SEASON	AVERAGE ATTENDANCE	LEAGUE RANKING
2014	4,870	2
2013	4,843	2
2012	4,445	2
2011	4,267	2
2010	4,068	2

Nat Bailey Stadium has an approximate capacity of 5,100 with a number of additional over-flow seating areas that can allow spectator attendance to exceed 7,000. Naming rights to the facility were purchased by Scotiabank in 2010. Success of the Canadians has led the franchise to explore options for expanding seating capacity at the facility. The facility is also used by the UBC Thunderbirds Baseball Club in the spring.



THE ALBERTA LANDSCAPE

Strong baseball infrastructure also exists within a number of Alberta communities. The Okotoks Dawgs of the Western Major Baseball League (WMBL) consistently draw over 2,000 fans per game to Seaman Stadium. Seaman Stadium opened in 2007 and has been acclaimed as one of the best small spectator baseball venues in North America. The facility has 1,600 fixed seats with an outfield berm that can accommodate over 1,000 additional spectators.

MLB affiliated baseball has a strong history in southern Alberta. The Medicine Hat Blue Jays were in existence for 25 years and played a key role in the development of numerous future Toronto Blue Jays stars. A number of Pioneer League franchises have also existed in Lethbridge during the 1980's and 1990's.

The Western Major Baseball League continues to have a strong presence in Alberta with teams in Lethbridge, Okotoks, Edmonton, and Medicine Hat. In total, four of the league's eleven (11) franchises are located in Alberta. In addition to Okotoks, a number of communities in Alberta have made a significant investment in baseball infrastructure. The Regional Recreation Corporation of Wood Buffalo (ONE) is currently developing a spectator baseball stadium with hopes of attracting a major tenant in the future.





5

STAKEHOLDER CONSULTATION

Interviews were conducted (in-person or by phone) with a variety of baseball stakeholders and officials in order to further explore the current status, issues, and future opportunities for professional and competitive amateur baseball in Edmonton. A variety of individuals were invited to participate in an interview session with a member of the consulting team. Local interviewees included past and current franchise operators, noted individuals from the Edmonton baseball community, and key senior staff from organizations within the broader Edmonton sporting community. Interviews were also conducted with a number of non-local individuals such as professional league commissioners, franchise operators, and senior officials from governing bodies within the sport of baseball. In total, 24 interview sessions were conducted with 28 individuals. ***A complete list of interviewees can be found in the Appendix.***

Key findings from the stakeholder interviews are summarized below. In most instances specific comments and opinions are not attributed to individuals but are rather presented as prevalent themes from the discussions.



BASEBALL IN EDMONTON

Consistent throughout the discussions with locally based individuals was the stated importance and value that baseball has within the Edmonton sporting landscape. A number of interviews expressed that the greater Edmonton region is one of the strongest amateur baseball areas in the province and that the baseball “vibe” in Edmonton is a product of the past successes of competitive amateur and professional baseball teams, high profile events hosted in the city and the existence of quality coaches. While the Trappers were often cited as being the foundational piece to the Edmonton baseball scene a number stakeholders expressed that baseball was successful in the city well before the arrival of the franchise. Since the Trappers left, there is a general sense of loss and the marketplace is confused over the level of baseball that has been available.



IMPORTANCE OF LEADERSHIP & COLLABORATIVE EFFORT

Despite the strong culture of baseball in Edmonton, a number of interviewees expressed that there is currently a lack of collective leadership within the local baseball community. This situation was attributed to a number of factors which included the retirement of key individuals and frustrations with the current state of professional baseball in the city. A number of individuals suggested that while the financial capabilities may exist for professional baseball to return, long term viability and success of a franchise will require leadership and a vision from key baseball stakeholders and the City. For baseball to flourish (at all levels) it will require broad leadership from the baseball community and related stakeholders.



EDMONTON'S PAST EXPERIENCES WITH PROFESSIONAL BASEBALL

Numerous opinions and perspectives were shared on Edmonton's past experiences with professional baseball. A number of those interviewed expressed regret and disappointment over Edmonton losing the Trappers franchise. A common sentiment was that the Trappers were a significant asset to the region and played a key role in driving baseball interest and participation. Strong opinions also existed regarding Edmonton's experience with independent professional baseball in recent years. The Edmonton Cracker Cats franchise was cited by multiple stakeholders as not reflecting the values and strength of Edmonton's baseball community. The Edmonton Capitals franchise was generally viewed as a success with a number of interviewees indicating that the club was starting to gain significant momentum and awareness before external factors (league ceasing operations) resulted in the franchise going dormant.



LOCAL PERSPECTIVES ON THE FUTURE OF PROFESSIONAL BASEBALL IN EDMONTON

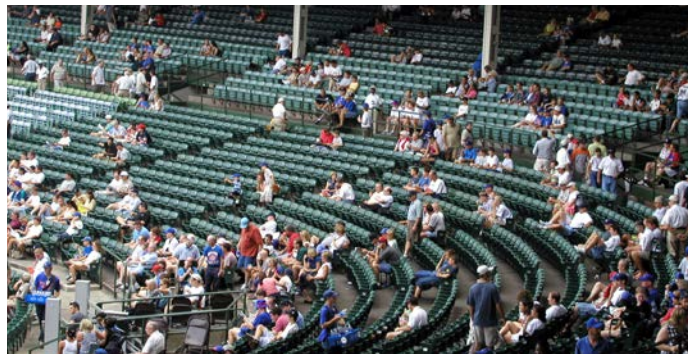
The future of professional baseball in Edmonton was a passionate point of interest and discussion for many interviewees. For the most part, those interviewed saw the return of professional baseball as a strong probability and desirable for the city. Multiple stakeholders expressed that any future professional baseball franchise in Edmonton needs to be well run, sustainable and must have a strong 'grassroots' connection to the baseball community.

While locally based interviewees and stakeholders unanimously agreed that Edmonton needs to have a long term tenant for Telus Field, varying opinions existed on the right level and "fit".

- The success of independent baseball in Winnipeg and the recent experience with the Capitals were cited as demonstrating the potential of independent professional baseball.
- Multiple stakeholders indicated that demonstrating success with an independent professional baseball franchise may be a road back to MLB affiliated baseball.
- However some stakeholders indicated that MLB affiliated baseball should be the sole focus and that the level of independent professional baseball has inherent

challenges. Many of these individuals believed that if an affiliated baseball franchise cannot be secured it is better to help the Prospects grow and thrive.

A commonly held perspective is that the Oilers Entertainment Group (OEG) is keenly interested in re-activating the Capitals. This was confirmed in discussions with representatives from the OEG who indicated that they have had discussions with the American Association of Independent Professional Baseball. The OEG indicated that they would require a long term lease of Telus Field in order to secure and successfully operate an independent professional franchise.



OTHER PERSPECTIVES ON THE FUTURE OF PROFESSIONAL BASEBALL IN EDMONTON

Interviews were conducted with representatives from a variety of affiliated and independent baseball leagues. Included in these discussions were commissioners and franchise operators. Edmonton was viewed as a strong baseball market and the current lack of professional baseball in Edmonton is not generally viewed as being a reflection of the market potential or level of fan interest. Geographical concerns were overwhelmingly cited as being the significant barrier to professional baseball in Edmonton.

Discussions with a representative from the Pacific Coast League (PCL) revealed a number of interesting perspectives on the past experience with the Trappers and future potential for professional baseball in Edmonton. Numerous positive comments were provided on the Trappers and the local support for the franchise.

- Edmonton was identified as the strongest of the three Canadian markets in the league.
- Feedback to the league from players and coaches that had played in Edmonton was highly positive regarding the experience, facilities and fans.

The PCL indicated that travel and logistical concerns made the existence of a franchise in Edmonton challenging and were the primary reason for relocation of the Trappers. The PCL indicated that expansion back into Canada is not currently being contemplated but could be re-evaluated in the future if the affiliated baseball landscape changes (e.g. expansions, re-structuring of the league, etc.). Should PCL expansion occur back into Canada it is likely that multiple franchises would be required in order to create “sister cities” and alleviate travel constraints and related costs.

Discussions with a representative from the American Association of Independent Professional Baseball confirmed that some discussions have taken place with the Oilers Entertainment Group. The strength of Edmonton as a baseball market and the local economy were cited as being strengths of the city as a potential expansion market. However, travel and geographic concerns were again cited as needing to be mitigated in order for an Edmonton franchise to be viable within the current structure of the league.

A consistent perspective held by league and franchise operators was that Edmonton is not a suitable fit for MLB affiliated baseball below the Triple A level. Affiliated leagues under Triple A primarily use bus transportation and the current geographic distribution of leagues is unlikely to view Edmonton as a viable market.



GENERAL ATTITUDES & PERSPECTIVES TOWARDS PROFESSIONAL BASEBALL

Discussions with past and current league and franchise operators across North America helped confirm a number of challenges, opportunities and opinions related to the overall state of professional and minor league baseball. Common perspectives included:

- MLB affiliated professional baseball remains attractive and is a valued asset for cities that have franchises.
- Independent professional baseball has a select number of strong leagues, but is overall more turbulent.
 - » The American Association of Independent Professional Baseball was mentioned by numerous stakeholders as being one of the strongest and most successful independent professional leagues.
 - » A number of stakeholders cited the propensity for failure and risk associated with start-up independent professional leagues (at all levels).
- Key challenges facing professional baseball are travel costs, lack of municipal “buy-in” and the poor economy in many American markets.
 - » Municipal “buy-in” is a key success factor for markets that are successful.
- Varying opinions exist on independent professional baseball. Concerns expressed by some stakeholders included:
 - » Varying quality / legitimacy of franchise operators.
 - » Lack of stability with the league and players.
 - » Mixed messaging / confusion as to the actual level of baseball being played (and being sold to the marketplace).
- The Can-Am League is growing and has a number of strong and upstart Canadian franchises.
- Major League Baseball and its affiliated minor leagues are generally strong with good attendance and support across North America.

CURRENT STATUS & PERSPECTIVES ON COLLEGIATE BASEBALL

A number of perspectives were shared on the current status and future opportunities for collegiate baseball in Edmonton and the broader region. A number of individuals expressed that the Western Major Baseball League (WMBL) is important on a regional basis as it provides opportunities and pathways for high level local players to develop. A number of individuals expressed that the WMBL is evolving and has some challenges. The shortened season presents a number of business challenges for many franchise operators as the ability to generate revenue from late July and August dates does not currently exist.

A number of interviewees also commented on efforts that are being undertaken to expand the reach of Canadian University baseball. Suggested benefits of bringing Canadian University baseball to the region included increased profile of the sport, opportunities for local athletes, a potential secondary tenant for Telus Field and synergies with professional levels of baseball.



TELUS FIELD

The current operations and future of Telus Field was a point of discussion with many stakeholders. The majority of interviewees indicated that the facility is a major asset for the city and region and needs to be preserved. A number of upgrades were suggested by stakeholders for the facility.

- Removal of metal bleachers to reduce capacity and create new space opportunities.
- Re-purposing of spaces to create additional group areas (e.g. BBQ pits, kids play areas, corporate function areas).
- Creation of lease spaces (e.g. restaurants, coffee shops) on the exterior of the building to service the existing community and future development.

Future development of the adjacent Rossdale neighbourhood was commonly mentioned as providing an opportunity for the facility. Multiple stakeholders expressed that the city should view Telus Field as an asset to future neighbourhood development and that the creation of a baseball stadium district could potentially have benefits similar to those being identified for the downtown arena district.

Current access and use of Telus Field was a concern for some stakeholders. A number of individuals expressed that there is inconsistent access and cost to use the venue. It was suggested that any future lease agreements need to ensure equitable access to the venue. Ultimately, future operations of the stadium need to reflect “public good” and ensure that the venues potential can be maximized.

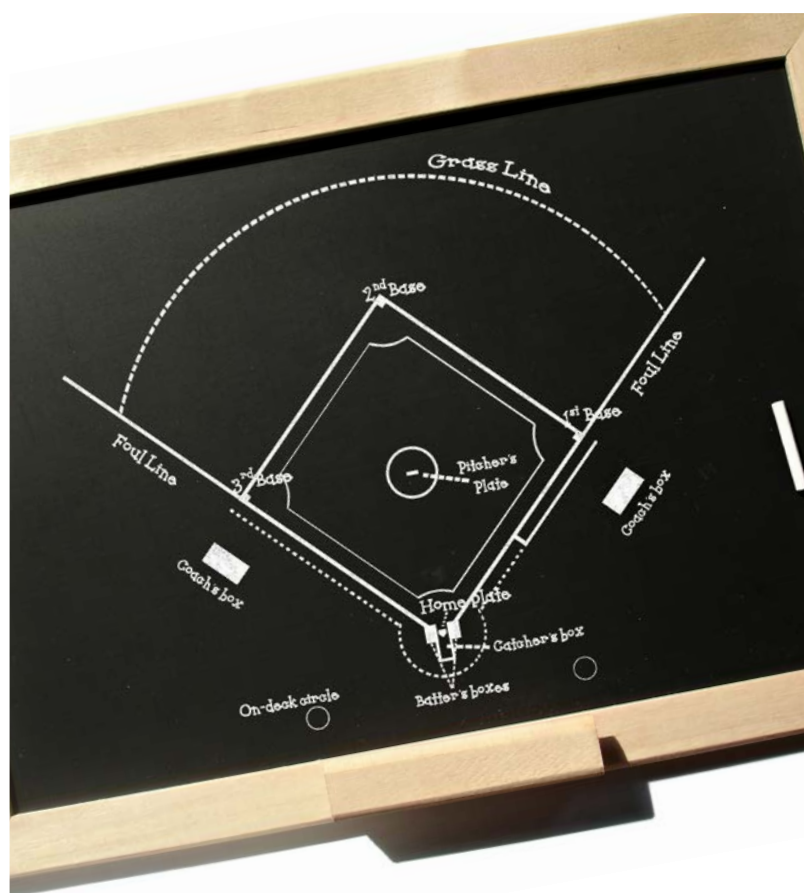
A number of stakeholders suggested that Telus Field has the potential to be a ‘hub’ of baseball for the region and province. It was suggested that the facility could be home to a baseball academy or centre of excellence which would benefit and provide synergies with future professional baseball franchises.

Various perspectives existed on the future use of Telus Field by the Edmonton Prospects. Stakeholders were appreciative of the Prospects providing baseball at Telus Field during the previous two seasons with a number of individuals expressing that the Prospects should be accommodated at the facility moving forward. However, other individuals suggested that Telus Field might not be the ideal venue for summer collegiate baseball. The short playing season and potential conflicts with future professional franchises were cited by some individuals. Many interviewees indicated that the Prospects and a future professional baseball team could successfully co-exist; however, others believed that this situation would create market confusion.

BASEBALL EVENTS

Interviewees expressed significant and sincere appreciation for the past efforts of the Edmonton International Baseball Foundation (EIBF) and especially chairperson Ron Hayter. However, while the the EIBF is believed to be financially solvent there was some uncertainty expressed as to the EIBF’s capacity and future role in competing for baseball events.

Discussions with non-local baseball individuals revealed a number of future considerations for baseball related event hosting in Edmonton. It was suggested that premier baseball events may have outgrown the facilities and amenities available in Edmonton but that Telus Field might still be attractive to some international and national events. A number of interviewees suggested that the baseball and sporting community in Edmonton should be more aggressive in creating baseball related events, which could be enhanced with the return of a professional baseball franchise due to the potential for All-Star games and inter-league tournaments.





SUMMARY OF FINDINGS & POTENTIAL IMPLICATIONS

The assessment of the professional and high level amateur baseball landscape in Edmonton as presented in this report has included primary and secondary research. These research elements have included a review of trends and issues facing professional and competitive amateur levels of baseball as well as engagement with local and regional stakeholders. The findings and information outlined in the report will be important to consider when contemplating future opportunities for the growth and advancement of high level amateur baseball in Edmonton.



Identified as follows are selected key findings and implications from the research that have the potential to impact the future of baseball in professional and competitive amateur baseball Edmonton.

- Edmonton is recognized as having a **strong baseball culture and heritage**.
- The future success and prosperity of professional and competitive amateur baseball in Edmonton **will require strong leadership** by a number of stakeholders, including the City of Edmonton.
- Competitive amateur and collegiate baseball in Western Canada is considered **important to the future development of the sport** and is currently in a state of evolution.
- Stakeholder engagement revealed that there remains a strong desire for the return of MLB Affiliated AAA baseball to Edmonton.
 - » It was strongly suggested by many stakeholders that Triple-A baseball should remain the goal; however it is likely necessary to demonstrate success over a period of time with independent professional baseball.
 - » While a number of stakeholders believe that Triple-A baseball is a good fit for the Edmonton market (either on a transitional or long-term basis) other contrasting opinions exist.
- **Sustainability and success** of professional baseball in Edmonton is dependent on a number of key factors.
 - » **Stability of ownership.**
 - » **Connection to the “grassroots” baseball community.**
 - » **Market clarity** regarding the level of baseball.
- **Telus Field is a highly valued asset for the city and region.**
 - » Future planning and management structure for Telus Field needs to consider trends in baseball infrastructure and the potential to incorporate secondary activities.
 - » Telus Field should have a critical place within the potential Rossdale development and be viewed as an opportunity to expand usage, refresh amenities and create a vibrant community around Telus Field.
- **Strengths** of Edmonton as a professional baseball market include the perception of a strong baseball culture in the city, economy, and the existence of Telus Field.
- **Challenges** facing Edmonton as a professional baseball market include geography, weather, and professional baseball dynamics.



APPPEEN

A photograph of baseball players in a dugout, overlaid with a semi-transparent green filter. The image shows a player in the foreground on the left, wearing a batting helmet and holding a bat. Another player is visible on the right, wearing a catcher's mask. The background is a blurred dugout area.

INDICES



LIST OF INTERVIEWEES

	NAME [ASSOCIATION / GROUP]
1.	Branch B. Rickey (Pacific Coast League)
2.	Joe Sperle (Freedom Pro League)
3.	John Kastner (Intercounty Baseball League)
4.	Patrick LaForge & Nick Wilson (Oilers Entertainment Group)
5.	John Ircandia (Okotoks Dawgs)
6.	Patrick Cassidy & Ray Brown (Edmonton Prospects)
7.	Gary Shelton (Edmonton Sport Council)
8.	Orv Franchuk
9.	Lou Pote
10.	Gord Gerlach (Oilers Entertainment Group)
11.	Judge Al Wachowich
12.	Wally Footz (Edmonton International Baseball Foundation)
13.	Don Paulencu and Darren Dekinder (Baseball Alberta)
14.	Jim Baba (Baseball Canada)
15.	Lloyd Bentz (Alberta Sport Connection)
16.	Paul Riopel (North Central Alberta Baseball League)
17.	Dr. Tom Hinch (University of Alberta)
18.	Dr. Dan Mason (University of Alberta)
19.	Mark Randall (St. Francis Xavier Baseball Academy)
20.	Ted Hotzak (Premier Baseball League)
21.	Don Stewart
22.	Wilf Brooks
23.	Miles Wolff (American Association of Professional Baseball)
24.	Mel Kowalchuk and Darrin Kowalchuk



