



EXECUTIVE SUMMARY

MARKET RESEARCH / FINANCIAL VIABILITY STUDY FOR
ALLAN GARDENS
CITY OF TORONTO

NO. 9145-00-7360
PREPARED in DECEMBER, 2001, by:
ROGER JONES & ASSOCIATES
ARTHUR ANDERSEN LLP
CARRUTHERS SHAW AND PARTNERS LIMITED, ARCHITECTS
HELYAR & ASSOCIATES, CHARTERED QUANTITY SURVEYORS



EXECUTIVE SUMMARY

- E1. Roger Jones & Associates, in association with Arthur Andersen LLP and Carruthers Shaw and Partners Limited, Architects, were contracted in early 2001 by the City of Toronto to conduct a Market Research and Financial Viability Study for Allan Gardens.
- E2. We first examined the present strengths and weaknesses of the grounds and facilities, and investigated future opportunities and threats.
- E3. The primary, and considerable, **strengths** of Allan are its very size, its location as a green space in the downtown core of the City, its heritage Palm House, the significant collection in the Conservatory, the park arboretum, the potential for both Park and Palm House to be restored adhering to heritage guidelines, and the potential of the Conservatory to be enlarged and retrofitted to make it a destination for a far larger audience than at present.

There are also numerous **weaknesses**, which derive from decades of neglect both of the grounds and the facilities (albeit with some determined interventions, and a recent focus on accelerated renovation), include under-staffing, isolated and un-integrated park features, a lack of Conservatory size and ancillary features necessary for market development, and conflicting Park and Conservatory uses.

- E4. Four options for the future emerge:

- I Maintain the status quo*
- II Seek a truly magnificent Conservatory and Gardens, with a substantial, architecturally extraordinary new showhouse to the West of the present structures (facing and with a new entrance on Jarvis Street), and with the intent of creating for Toronto a Conservatory and Gardens that would be regarded as in the first league among major cities of the world.*
- III Seek restored heritage gardens, a restored Dome and Cupolas, improvements and a linkage addition to the conservatory structure, beds and collection, and other rationalizations and improvements in the Park in order to bring a much greater integrity and fuller experience to the Conservatory and open spaces than at present, and thereby to appeal to a far larger and broader audience.*
- IV As for III, except that the link structure would be significantly larger, presenting the opportunity for a major Display House.*

E5. The recommended course of action is Option IV. Elements include:

E5.1 The Conservatory

- A faithfully restored Palm House, containing primarily palms and related plants; similarly, the cupolas should be restored.
- Improvement in the Conservatory beds - dealing with the gravel layer and the build-up of vermiculite.
- A long-term plan for the Collection
- Continued general restoration following the findings of the Baird Sampson Neuert Report
- Removal of the present administrative building, the Boiler House (except, perhaps, the chimney, which could be retained as a heritage feature,) and the Parks yards.
- Completion of the rectangle of the present Conservatory with a "link" greenhouse, incorporating:
 - * a multi-purpose area for income generation:
 - weddings;
 - corporate functions
 - civic functions.
 - * a private courtyard:
 - display;
 - programming;
 - revenue functions.
 - * a gift shop
 - * a tea room.
 - * administrative functions, a library and utilities in the basement;
- Introduction of modest and carefully justified admission charges.

E5.2 The Park Area

- Development of Heritage Gardens, which would be dog-free areas;
- Rationalization of circulation and elements in the park;
- Demolition of the present children's play area and provision of a new children's play area;
- Introduction of an improved bus drop-off and lay-by arrangement.
- Provision of stand-alone public washrooms in the Park, not associated with the Conservatory;
- Removal of the present ornamental fountain, and its replacement with a striking new water feature;
- Action to define the edges of the Park, including attractive, ornamental welcoming gates.

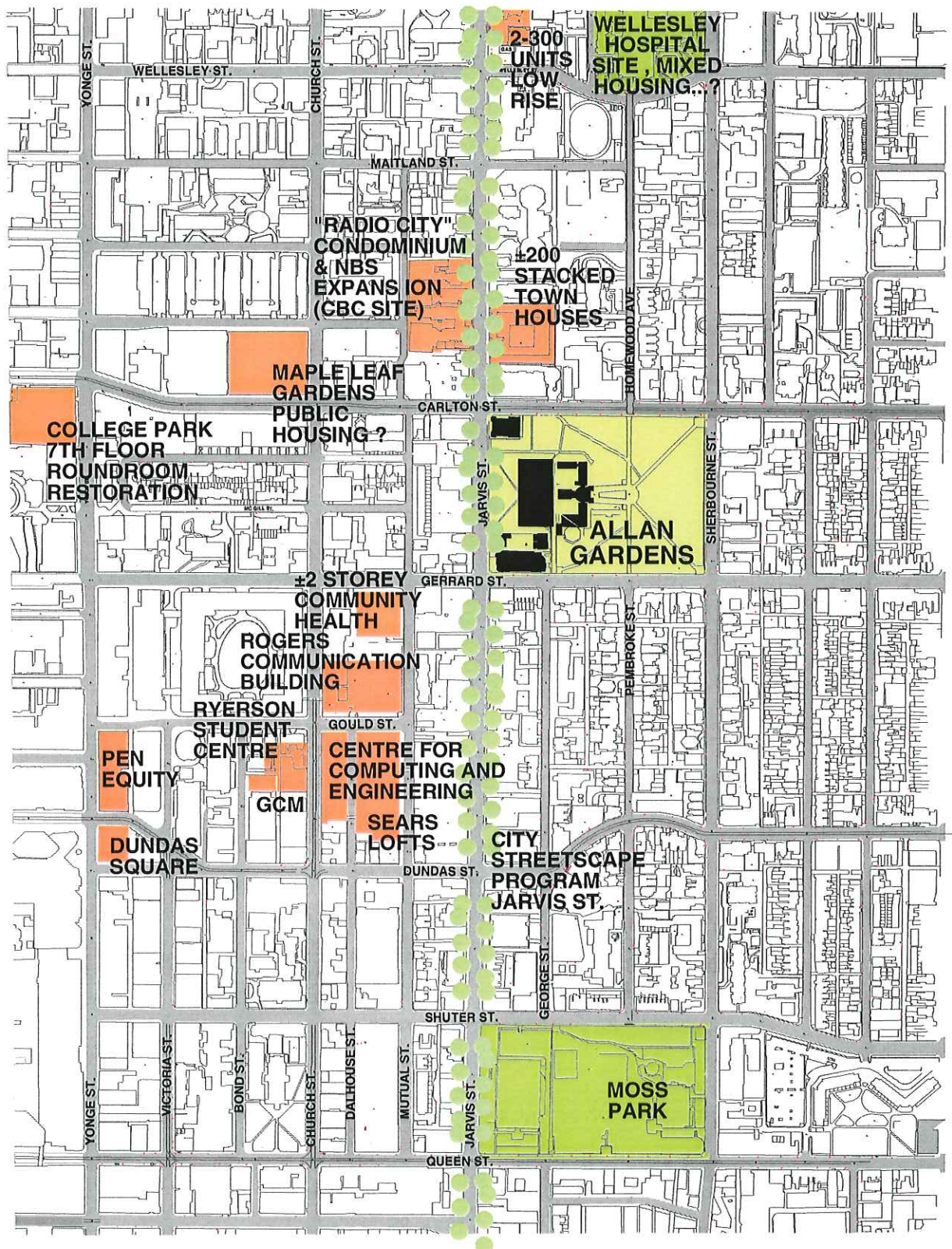
- E6. We have examined the **present visitation** to the Allan Gardens Conservatory and the potential market for a restored and expanded facility. The present visitation is tiny - estimated at less than 30,000 annually. This mainly consists of locals and middle-agers to seniors with a strong interest in gardening, some school and other groups and some tourists (though these are clearly under-represented), as well as occasional weddings and film shoots.
- The **potential visitation** could be 200,000 to 400,000 a year, based the experience of other Toronto cultural attractions, of conservatories elsewhere, and the potential of horticultural, cultural heritage, tourism and local demand.
- E7. Of growing concern as the study progressed was the realization that the present social conditions in - and reputation of - the Park are not conducive to realizing the goals of restoration, expansion and substantial visitor augmentation. Demonstrated amelioration of this situation is a prerequisite.
- E8. As part of our analyses and investigations, we gathered data on 14 **comparable Canadian and United States Conservatories**. This data is contained in Appendix Two, and summarized in Section Five of this report. The comparisons underline both the renaissance in Conservatories, their deepening role as exemplars for a healed environment, and the corresponding reinforcement of public support for their active presence.
- It further has provided a wealth of examples as to how to provide the ancillary services welcomed by their publics, how to generate significant earned revenue through modest admissions, memberships and rentals, and how to enlist the energy of volunteers in numerous operating areas.
- E9. We have proposed **design goals** to the proposed approach to the physical redevelopment of the park, gardens, and buildings at Allan Gardens. We have also commented on Building Condition, By-Laws, Zoning and Support Facilities, and Historic Preservation.
- E10. We have examined the components of **potential revenue**. These include revenues from admission charges, special programs, a gift shop, a cafe, rentals, receptions, membership dues, sponsorships and grants. We have further reviewed **operating costs**. A resulting **10-Year Revenue and Expense Proforma** has been developed. It suggests near-doubling the operating budget (from an estimated current \$780,000 to a suggested \$1,430,000), and the achievement of this almost entirely through providing a new earned revenue stream.
- E11. The **impact** of the proposed concept on nearby attractions and other enterprises has been considered and discussed.
- E12. We have further generated a proposed **approach to marketing**.
- E13. Finally, we have presented a proposed **conceptual facility program**, and have confirmed that this program is appropriate to the thrust of the recommended expansion and future operations of Allan Gardens.

ALLAN GARDENS CONSERVATORY

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Revenues										
Admission Charges	\$ 500,000	\$ 515,000	\$ 530,450	\$ 546,364	\$ 562,754	\$ 579,637	\$ 597,026	\$ 614,937	\$ 633,385	\$ 652,387
Special Programs	10,000	10,300	10,609	10,927	11,255	11,593	11,941	12,299	12,668	13,048
Gift Shop	200,000	206,000	212,180	218,545	225,102	231,855	238,810	245,975	253,354	260,955
Café	7,500	7,725	7,957	8,195	8,441	8,695	8,955	9,224	9,501	9,786
Rentals - Films, Weddings	33,980	35,123	38,850	40,147	45,538	47,043	48,598	50,203	51,862	53,417
Private/Corporate Receptions	7,200	7,416	11,458	11,801	16,207	16,694	17,194	17,710	18,241	18,789
Membership dues	6,000	6,180	6,365	6,556	6,753	6,956	7,164	7,379	7,601	7,829
Private Donations/Fund Raising	10,000	10,300	10,609	10,927	11,255	11,593	11,941	12,299	12,668	13,048
Total Revenues	\$ 774,680	\$ 798,044	\$ 828,478	\$ 853,463	\$ 887,306	\$ 914,064	\$ 941,630	\$ 970,026	\$ 999,279	\$ 1,029,257
Expenses										
Salaries & Benefits	\$ 580,000	\$ 594,500	\$ 609,363	\$ 624,597	\$ 640,211	\$ 656,217	\$ 672,622	\$ 689,438	\$ 706,674	\$ 724,341
Administration	180,000	184,500	189,113	193,840	198,686	203,653	208,745	213,963	219,313	224,795
Marketing	100,000	102,500	105,063	107,689	110,381	113,141	115,969	118,869	121,840	124,886
Plant Provision	300,000	307,500	315,188	323,067	331,144	339,422	347,908	356,606	365,521	374,659
Gift Shop materials	100,000	102,500	105,063	107,689	110,381	113,141	115,969	118,869	121,840	124,886
Insurance	10,000	10,250	10,506	10,769	11,038	11,314	11,597	11,887	12,184	12,489
Utilities	120,000	123,000	126,075	129,227	132,458	135,769	139,163	142,642	146,208	149,864
General Maintenance	150,000	153,750	157,594	161,534	165,572	169,711	173,954	178,303	182,760	187,329
Capital Replacement/Main. Reserve	23,240	23,821	24,417	25,027	25,653	26,294	26,952	27,626	28,316	29,024
Total Expenses	\$ 1,563,240	\$ 1,602,321	\$ 1,642,379	\$ 1,683,439	\$ 1,725,525	\$ 1,768,663	\$ 1,812,880	\$ 1,858,202	\$ 1,904,657	\$ 1,952,273
Unfunded Liability	\$ (788,560)	\$ (804,277)	\$ (813,901)	\$ (829,975)	\$ (838,219)	\$ (854,599)	\$ (871,250)	\$ (888,175)	\$ (905,378)	\$ (923,016)

ALLAN GARDENS CONSERVATORY										
REVENUE ASSUMPTIONS	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Revenue - Admissions										
Number of Visitors	200,000									
Blended Admission Rate	\$2.50									
Admission Revenue	\$500,000	\$515,000	\$530,450	\$546,364	\$562,754	\$579,637	\$597,026	\$614,937	\$633,385	\$652,387
Revenue - Programs										
Revenue - Gift Shop - cons. visitors	\$10,000	\$10,300	\$10,609	\$10,927	\$11,255	\$11,593	\$11,941	\$12,299	\$12,668	\$13,048
purchase value	\$200,000	\$206,000	\$212,180	\$218,545	\$225,102	\$231,855	\$238,810	\$245,975	\$253,354	\$260,955
	\$10.00									
Café										
lease payment	\$7,500	\$7,725	\$7,957	\$8,195	\$8,441	\$8,695	\$8,955	\$9,224	\$9,501	\$9,786
Rentals:										
wedding & reception										
average charge	20	20	22	22	25	25	25	25	25	25
portion of caterers charge	\$1,200	\$1,236	\$1,273	\$1,311	\$1,351	\$1,391	\$1,433	\$1,476	\$1,520	\$1,566
revenue	\$500	\$515	\$530	\$546	\$563	\$580	\$597	\$615	\$633	\$652
	\$24,500	\$25,235	\$28,538	\$29,394	\$34,328	\$35,358	\$36,419	\$37,511	\$38,636	\$39,796
wedding photography										
number	58	60	62	64	66	68	70	72	74	74
charge	\$60	\$62	\$64	\$66	\$68	\$70	\$72	\$74	\$76	\$78
revenue	\$3,480	\$3,708	\$3,947	\$4,196	\$4,457	\$4,730	\$5,015	\$5,313	\$5,624	\$5,793
films/advertisements										
shooting days	12	12	12	12	12	12	12	12	12	12
charge	\$500	\$515	\$530	\$546	\$563	\$580	\$597	\$615	\$633	\$652
revenue	\$6,000	\$6,180	\$6,365	\$6,556	\$6,753	\$6,956	\$7,164	\$7,379	\$7,601	\$7,829
corporate & private receptions										
number	6	6	9	9	12	12	12	12	12	12
average charge	\$1,200	\$1,236	\$1,273	\$1,311	\$1,351	\$1,391	\$1,433	\$1,476	\$1,520	\$1,566
revenue	\$7,200	\$7,416	\$11,458	\$11,801	\$16,207	\$16,694	\$17,194	\$17,710	\$18,241	\$18,789
Membership Dues										
number of members	150	150	150	150	150	150	150	150	150	150
average charge	\$40	\$41	\$42	\$44	\$45	\$46	\$48	\$49	\$51	\$52
revenues	\$6,000	\$6,180	\$6,365	\$6,556	\$6,753	\$6,956	\$7,164	\$7,379	\$7,601	\$7,829
Fund Raising/Donations *										
	\$10,000	\$10,300	\$10,609	\$10,927	\$11,255	\$11,593	\$11,941	\$12,299	\$12,668	\$13,048

* conservative estimate; could be substantially higher

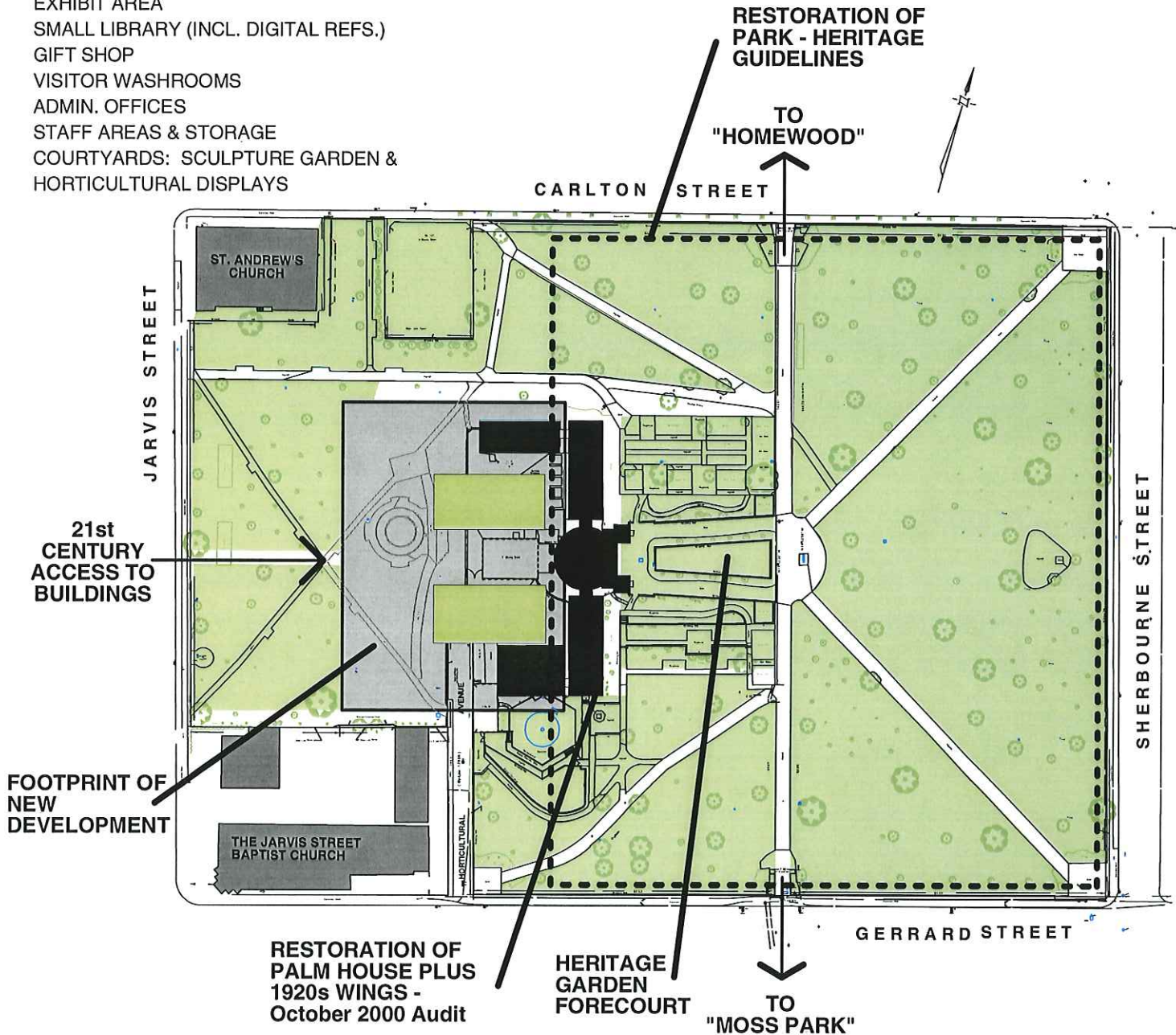


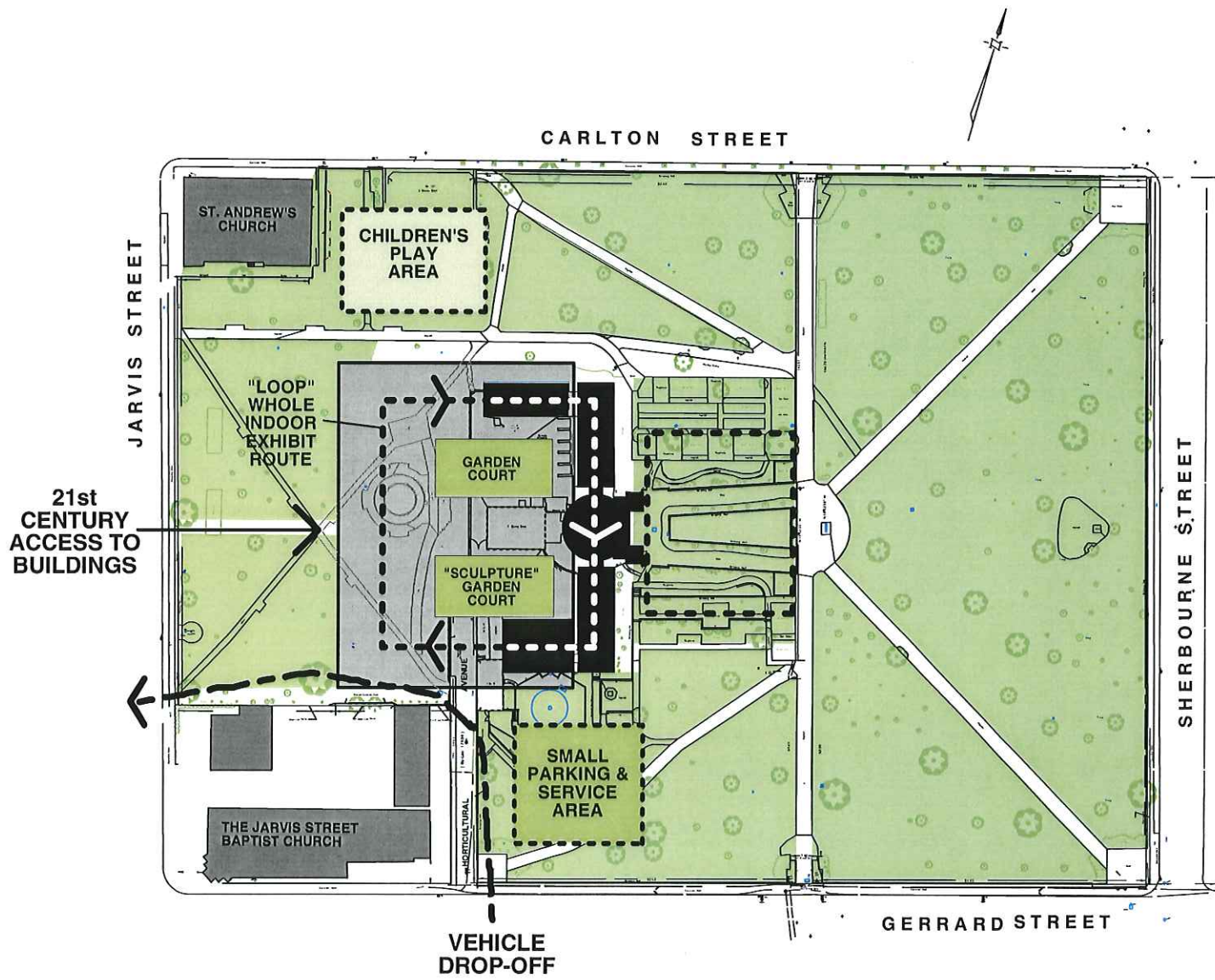
OUTDOOR SPACES NEEDED:

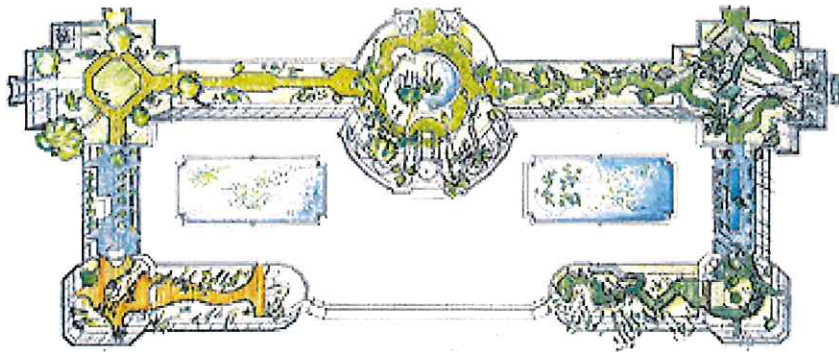
PLAYGROUND: COOLER, GREENER
CAFE(S): BRYANT PARK MODEL...?
PARK WASHROOMS

INDOOR SPACES NEEDED:

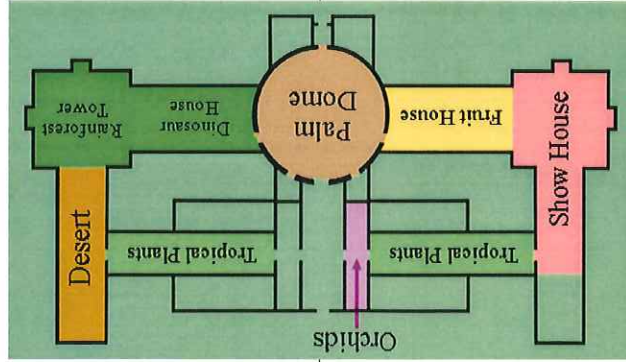
DISPLAY GREENHOUSE
CHILDREN'S TEACHING GREENHOUSE
PUBLIC LOBBY/ENTRY (TOUR BUSES)
MULTI-PURPOSE ACTIVITY SPACE
LECTURE/MEETING ROOM(S)
EXHIBIT AREA
SMALL LIBRARY (INCL. DIGITAL REFS.)
GIFT SHOP
VISITOR WASHROOMS
ADMIN. OFFICES
STAFF AREAS & STORAGE
COURTYARDS: SCULPTURE GARDEN &
HORTICULTURAL DISPLAYS



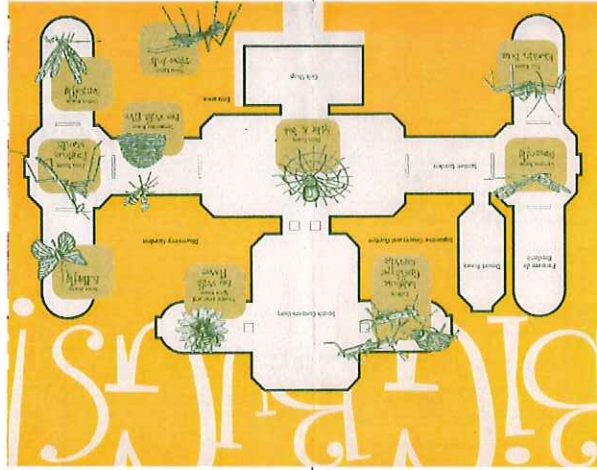




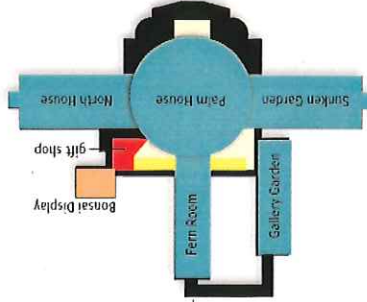
Enid Haupt Conservatory
New York Botanical Gardens
55,000 sf



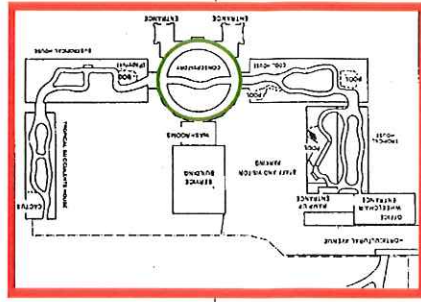
South Park Conservatory,
Buffalo + Erie County
Botanical Gardens
45,000 sf



Phipps Conservatory
Pittsburgh
44,000 sf



Como Park Conservatory
St. Paul, Minnesota
26,000 sf



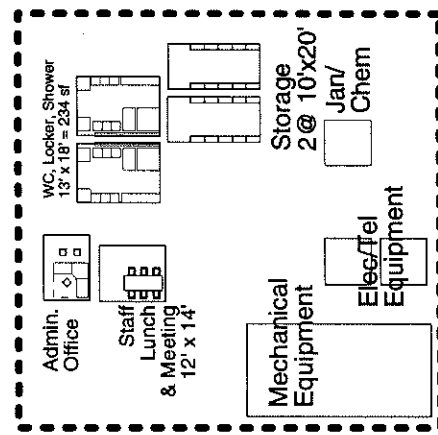
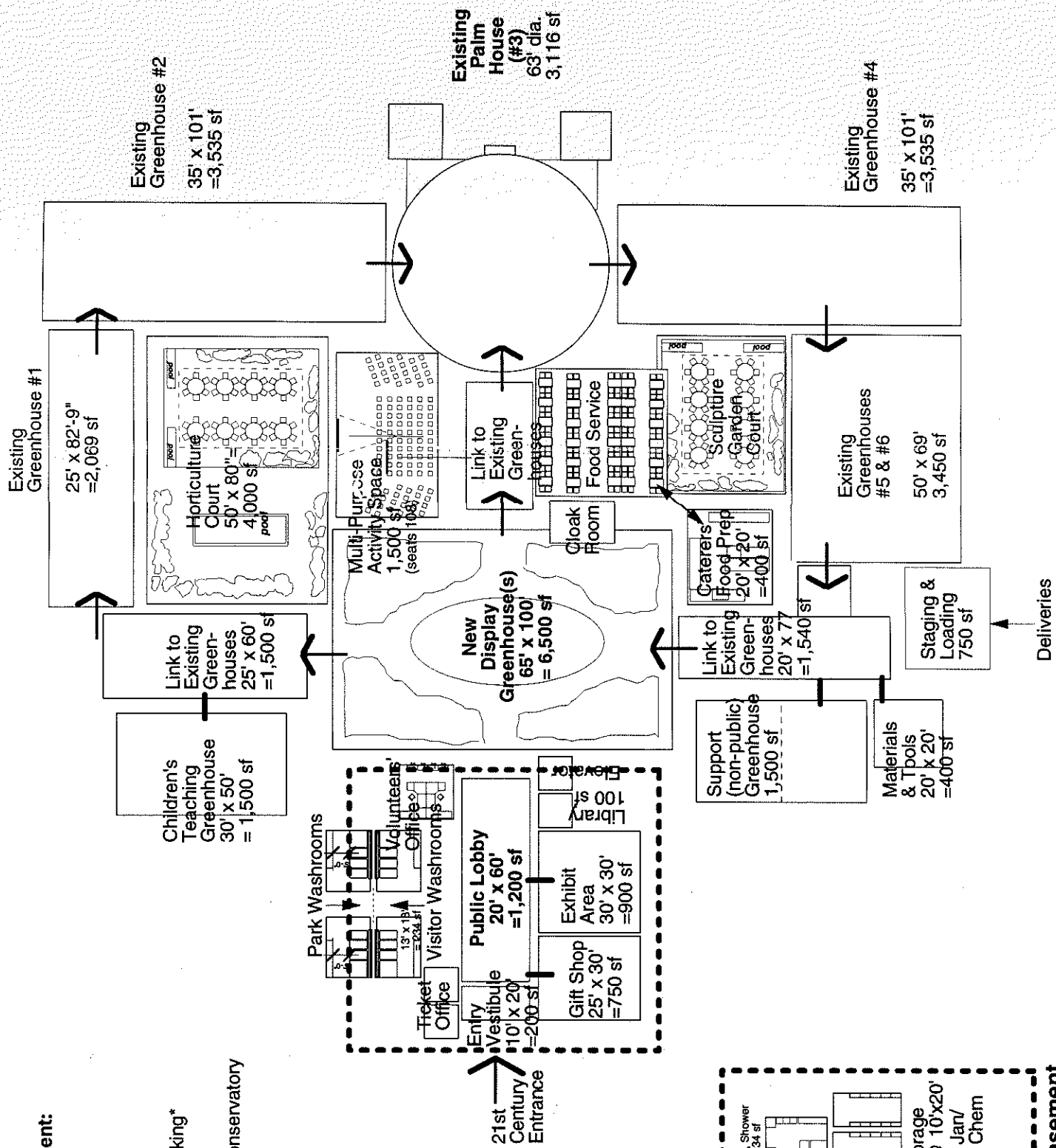
Allan Gardens Conservatory
Allan Gardens, Toronto
19,000 sf

Park Grounds Re-development:

- Concerts
- Arboretum (info. kiosks?)*
- Victorian Garden*
- Children's Playground*
- Bus drop-off*
- small service yard, bins, parking*
- off-leash area

*emphasize connexions to Conservatory

Tally of Floor Areas Required			
	sf	qty	net sf
Entry Functions:			
Vestibule	200	1	200
Ticket Office	64	2	128
Public Lobby	1,200	1	1,200
Gift Shop	750	1	750
Visitor Washrooms	234	2	468
Park Washrooms	234	2	468
Exhibit Area	900	1	900
Elevator	100	1	100
Library	100	1	100
Volunteers' Room	256	1	256
Attractions:			
Display Greenhouse	6,500	1	6,500
Links to Existing Greenhouse	1,500	2	3,000
Children's Teaching Greenhouse	1,500	1	1,500
Multi-Purpose / Lecture	1,500	1	1,500
Food Service	1,400	1	1,400
Support Functions:			
Caterers' Food Prep. (rough-in)	700	1	700
Cloak Room	250	1	250
Support Greenhouse	1,500	1	1,500
Materials & Tools	400	1	400
Staging & Loading	750	1	750
Basement:			
Staff Lunch & Meeting	168	1	168
Admin. Offices	150	1	150
WCs & Lockers	234	2	468
Storage	200	2	400
Janitor incl. Chem. Stor.	100	1	100
Mechanical Equipment	800	1	800
Elec/Tel Equipment	60	2	120
Subtotal, "Net" Floor Area			24,348
factor			1.4
Total "Gross" Floor Area Required			34,087



Functional Areas in the Basement

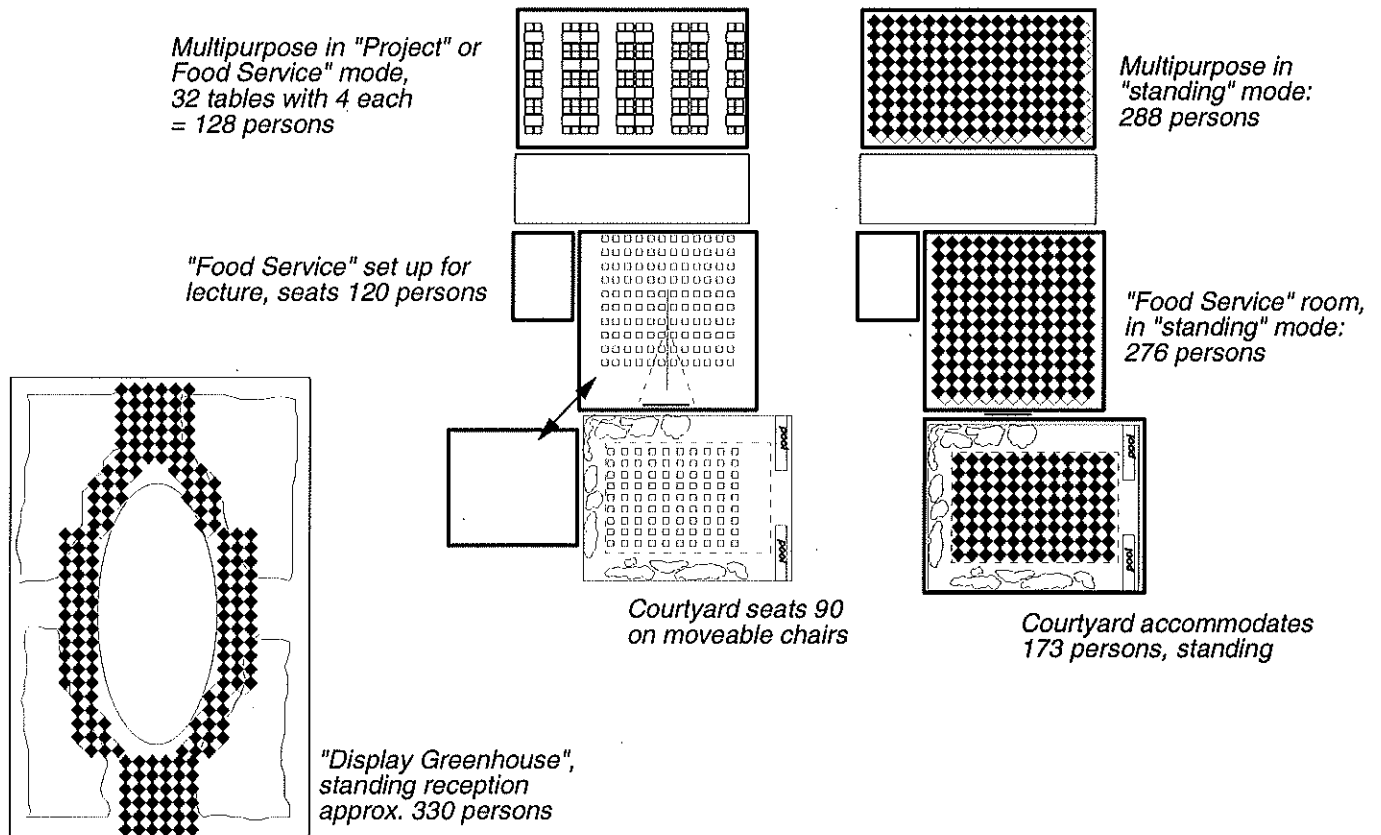
"comfortable" operating occupancy:

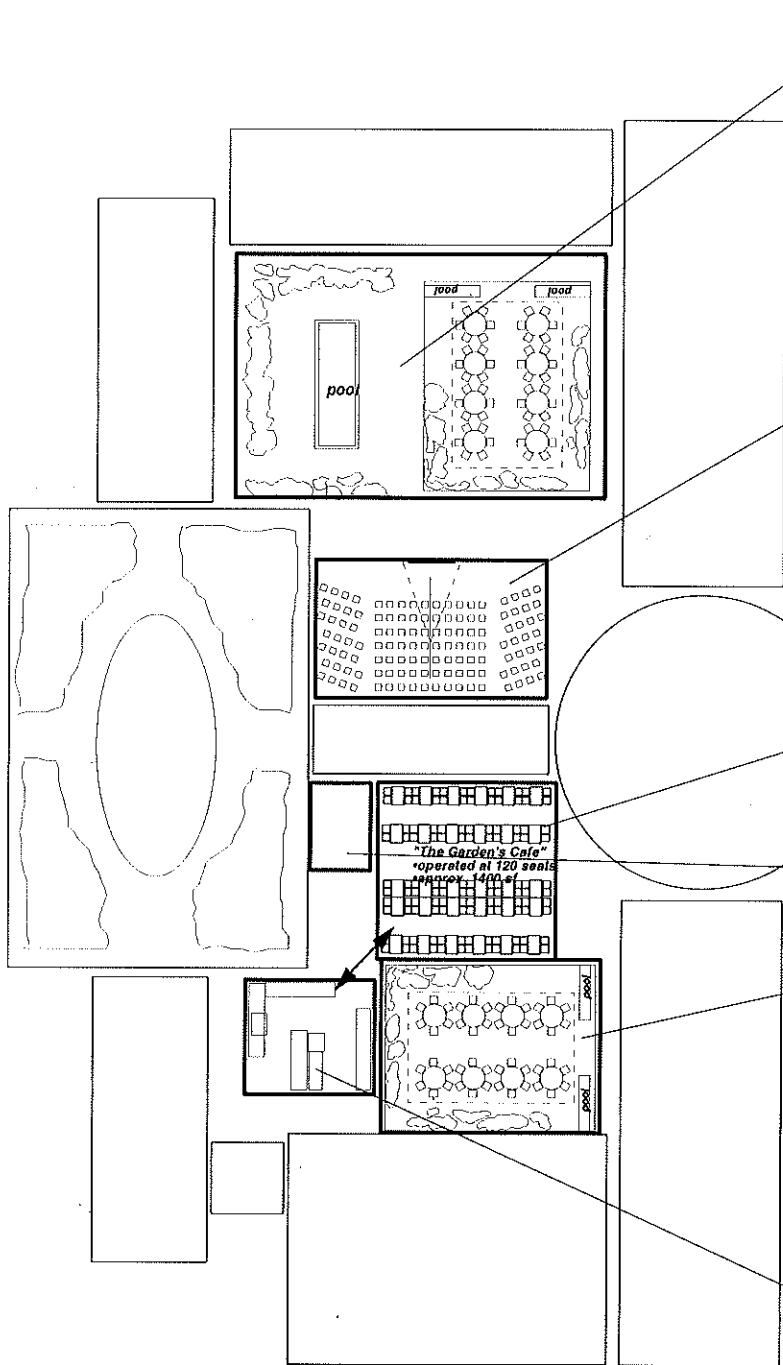
(figures in bold relate to "recommended" sketch, on previous page) total = 344

Occupant Load by "sketch layout"					
Space	Occ'd Area (sf)	at tables sketch	chairs only sketch	standing sketch	comment
Hort. Court	870	48	90	173	using half of available
Multipurpose	1,500	128	128	288	
Food Service	1,400	120	120	276	
Sculpture Court	870	48	90	173	
Display Ghouse	1,000	0	0	330	using aisles only
Range:		344	428	1,240	

theoretical maximum occupancy:

Ontario Building Code (OBC) Occupant Load					
Space	Occ'd Area (sf)	at tables 10.2 sf/p	chairs only 8.07 sf/p	standing 4.3 sf/p	comment
Hort. Court	870	85	108	202	using half of available
Multipurpose	1,500	147	186	349	
Food Service	1,400	137	173	326	
Sculpture Court	870	85	108	202	
Display Ghouse	1,000	0	0	233	using aisles only
Range:		455	575	1,312	





Horticulture Court

- 50' x 80'= 4,000 sf
- occasional use as second location for food service
- occupancy dependant on how much planting/reflecting pool/other landscape elements designed

Multi-Purpose Activity Space

- 1,500 sf
- 108 non-fixed seats shown (8.07 sf/person...186 max. possible)
- if set up with non-fixed seats and tables (see diagram at right), ~ (10.2 sf/person...147 max. possible)
- "standing" capacity (e.g. reception function) 4.3 sf/person...349 persons max. possible

Food Service

- 1,400 sf
- this increased from 700 sf shown on previous draft****
- based on RBG, "The Garden's Cafe" model which operates at 120 capacity
- if tables removed, "standing" capacity would be 325 sf

Cloak Room

- 250 sf added****

"Sculpture Court"

- RBG courtyard shown: seating for 48 at tables and loose chairs
- 1800 sf paved area, of which 870 is under tent
- this reduced from 3,000 sf shown on previous draft****
- alternate, chairs only: 223
- alternate, standing only: 419

Food Prep

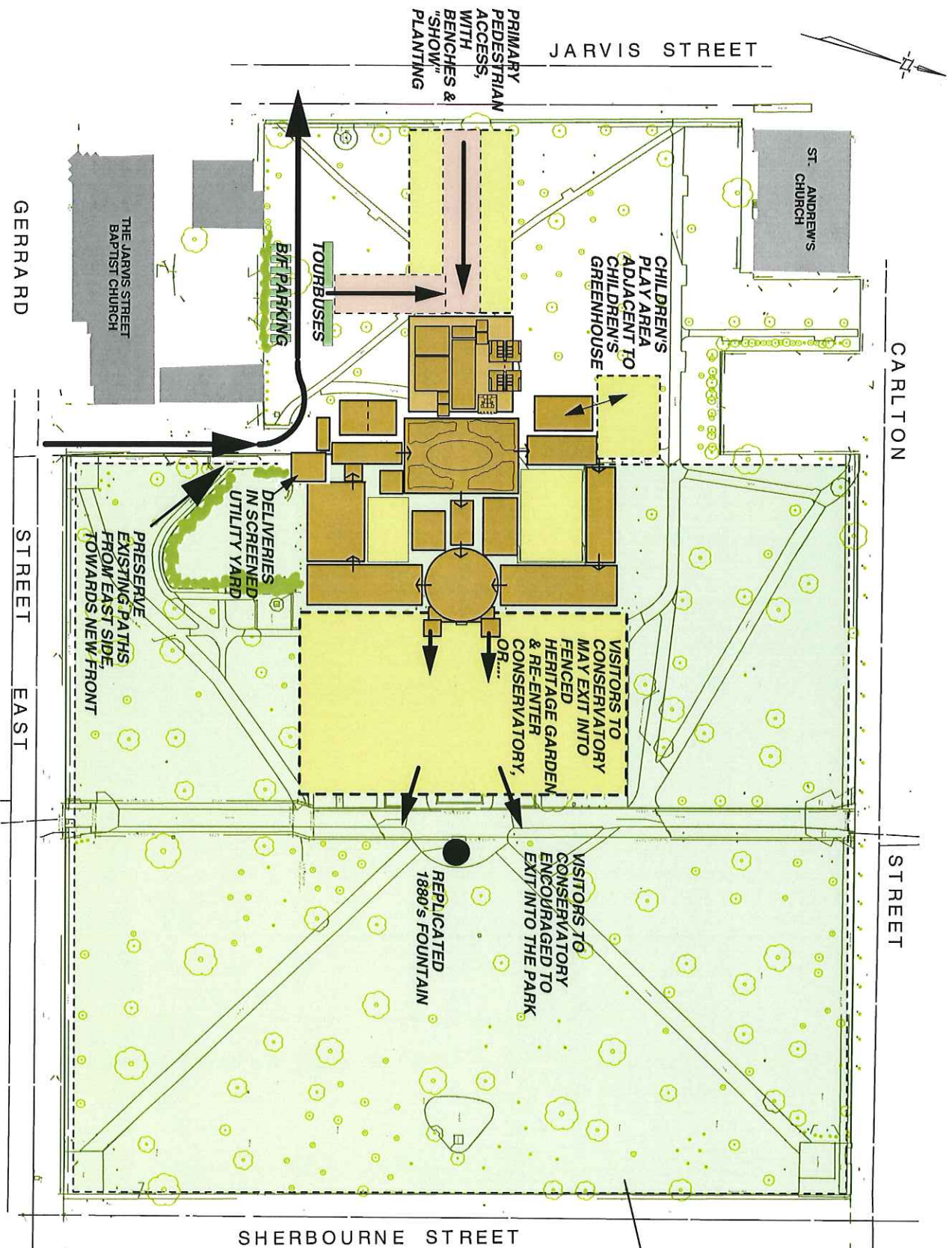
- to support food service in Cafe and one Courtyard, 170 lunches (or 325 + 419= 744 max. standing for hors d'ouvres)
- assume contract caterer for this site, include hot food prep, cold food prep and servery - 700 sf total
- this increased from 20' x 20'=400 sf shown in previous draft****

Recommended Occupancy of Assembly Spaces at Allan Gardens

Market Research ~ Financial Viability Study, City of Toronto

28 September, 2001

Roger Jones & Associates
Carruthers Shaw and Partners Limited, Architects
Arthur Andersen LLP



STREET

CARLTON

JARVIS STREET

GERRARD

STREET EAST

SHERBOURNE STREET

Conceptual Site Plan, with Program of Space Needs, Allan Gardens
 Market Research ~ Financial Viability Study, City of Toronto

28 September, 2001
 Roger Jones & Associates
 Carruthers Shaw and Partners Limited, Architects
 Arthur Andersen LLP