City of PICKERING

Arena Strategy

Recreation & Parks - Ten Year Plan

March 20, 2024 - DRAFT

Monteith+Brown planning consultants

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LARGO FACILITY MANAGEMENT

MJMA

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Limitations: This report was prepared by Monteith Brown Planning Consultants Ltd., Largo Facility Management, and MJMA Architecture & Design for the account of the City of Pickering. The material in this report reflects the consultant's best judgment considering the information available to it at the time of preparation. Any use which a third party makes of this report, or any reliance on or decisions to be made based on it, are the responsibility of such third parties. The consultants accept no responsibility for damages, if any, suffered by a third-party because of decisions made or actions based on this report.

1.0 Introduction

1.1 Project Overview

The purpose of this Arena Strategy is to guide planning and inform decisions for Pickering's arena system for the next 10 years (to the year 2034).

Specifically, the Strategy evaluates options for maintaining and/or reinvesting in Pickering's two municipal arena facilities and examines growth-related needs to provide additional facilities into the future. These assessments are based on a comprehensive analysis of background research, trends and best practices, demographics, and understanding of local and regional arena supply and usage levels. The Don Beer Arena is of specific focus to determine the future for this facility due to its life expectancy and the feasibility of this location.

The following **objectives** have been established for the Arena Strategy:

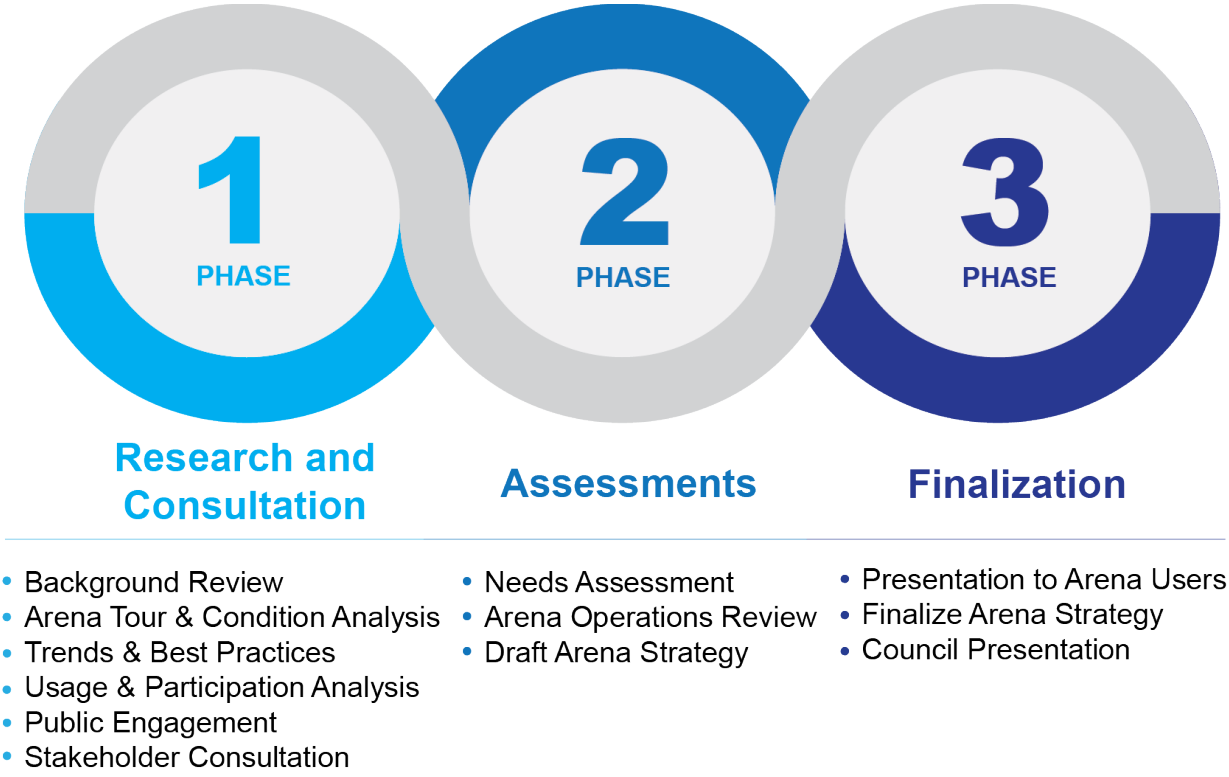
- Review background research including facility condition assessments, local demographics, and other documents pertinent to the Arena Strategy.
- Consider arena trends such as ice sport participation, facility design, and accessibility.
- Project future arena demand with consideration given to local and regional supply, distribution, utilization, operating performance, planned capital investments, and the ability to serve current and future residents.
- Consult with local arena and indoor facility users, the public, City staff, and Council to gather input and feedback on current and future ice needs.
- Project future ice surface demand based on the items above and make recommendations for major capital requirements over the next ten years.

The Strategy shares the same planning horizon as the City's updated 2024 Recreation & Parks – Ten Year Plan. As part of the plan's scheduled five-year update, the 2017 Master Plan recommended for an Arena Provision Strategy or comprehensive arena assessment to be prepared to determine whether a net expansion to the City's supply of ice pad and/or relocation of an existing ice pad(s) is warranted based on prevailing market forces and arena operating conditions.

1.2 Study Process

To achieve the Strategy's objectives, a work plan was devised that involved public and stakeholder consultation, thorough background research, evidence-based needs assessment, and evaluation of options. All inputs from this process are represented within this Strategy.

Figure 1: Arena Strategy Phasing



The demand analysis relies largely on data provided by the City of Pickering (usage data, registration figures, population projections, etc.) and stakeholder consultation, as well as trends in the sector.

Furthermore, because several local organizations have amalgamated with other centres and have membership boundaries that extend beyond Pickering, arena participation and demand in Ajax is also examined at a high level to gain a more accurate understanding of local arena demand.

Outdoor skating facilities are not able to satisfy requirements for organized play and are beyond the scope of this analysis. They are examined further within the Recreation and Parks Plan.

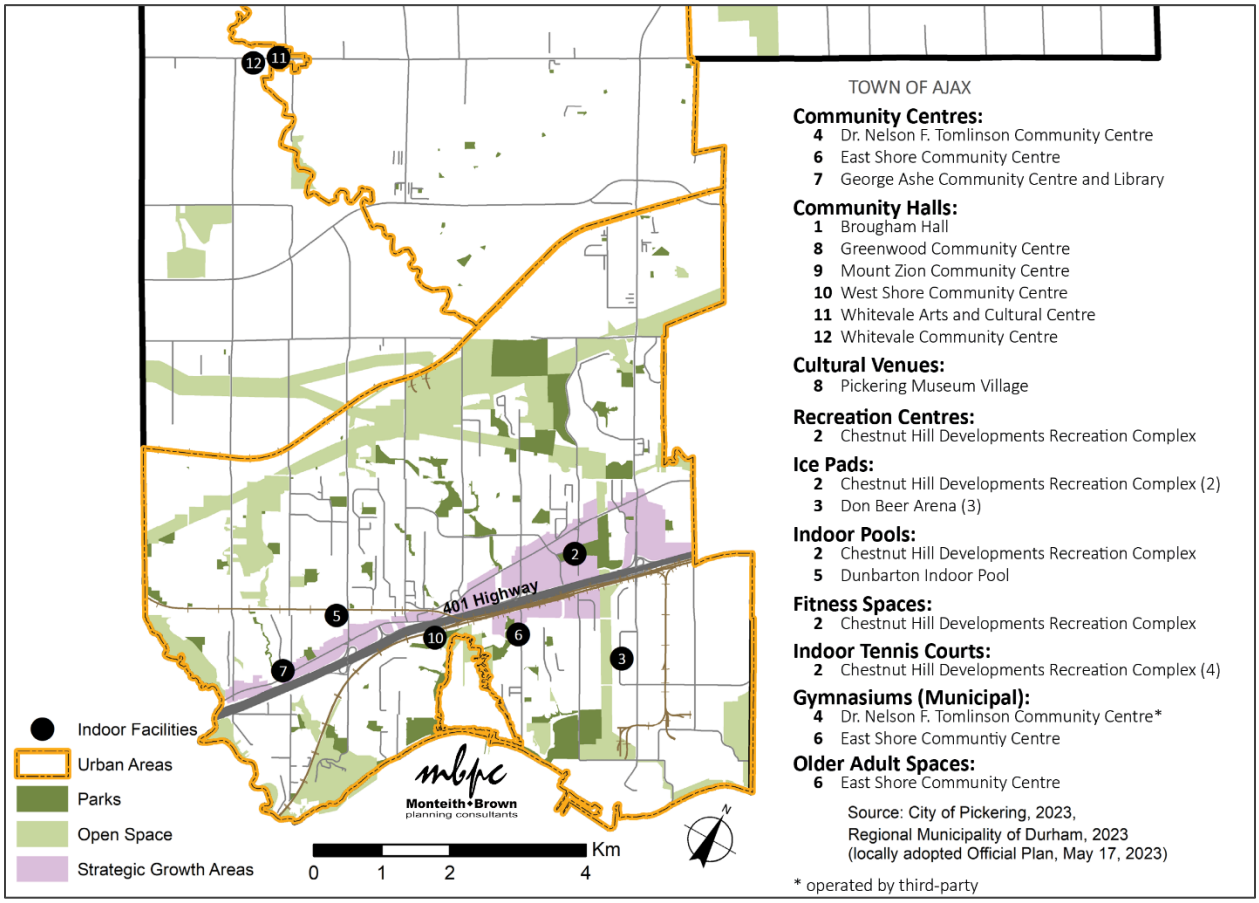
2.0 Existing Conditions

The City of Pickering's arena inventory is described in this section, along with other arenas in the region that may be used by local organizations. Local arena utilization and participation rate trends are also examined, as well as broader trends impacting ice sports.

2.1 Arena Inventory

The City owns and operates two (2) arena facilities containing a total of five (5) pads for ice and dry floor uses. The Chestnut Hill Developments Recreation Complex (2 pads) and Don Beer Arena (3 pads) are shown on the map below along with other municipal recreation facilities within Pickering's built-up area.

Figure 2: Arenas and Municipal Recreation Facilities, Built-up area of Pickering



Until 2019, the Art Thompson Iceplex (a privately-owned twin pad arena) was also available for rentals, largely being used for adult leagues. This facility has since been closed and demolished. There are no longer any private arenas in Pickering.

Chestnut Hill Developments Recreation Complex

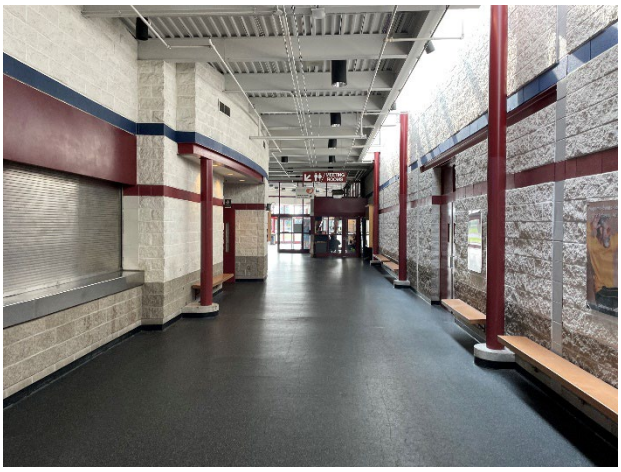
The Chestnut Hill Developments Recreation Complex (CHDRC) is located at 1867 Valley Farm Road, just north of Highway 401 and in the Pickering City Centre, surrounded by residential and commercial properties. The CHDRC is home to the Delaney and O'Brien pads, which are co-located with other recreational amenities (e.g., indoor pool, fitness centre, racquet courts, multi-purpose rooms, etc.). Current rink dimensions are less than NHL standard 200 x 85 feet: Delaney Rink – 190 x 85 feet; O'Brien Rink – 185 x 85 feet.

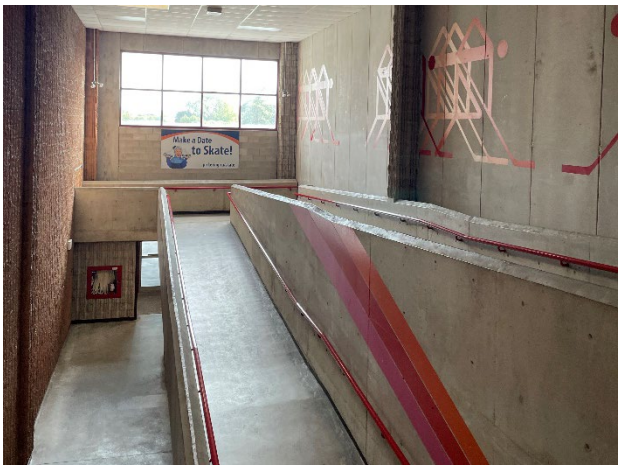
The Delaney Rink was constructed in 1983 (renovated in 2015) and the O'Brien Rink in 1992; both share common amenities including change rooms, storage areas, referee and coach rooms, concessions, lobby entrance, and customer service reception area. It is worth noting that the rinks do not share refrigeration systems and each ice rink has its own dedicated refrigeration plant room.

The Delaney Rink has seating for approximately 850 spectators. The seating capacity appears to currently serve the needs of the associations and teams currently playing at this rink – this pad is predominately used by the Pickering Panthers ice hockey team and the Pickering Skating Club.

The O'Brien Rink has a seating capacity of approximately 200. Again, this smaller capacity seems to work well for the associations and teams that use this ice pad – this rink is used mainly by Durham West Girls Hockey and the Ajax Pickering Ringette Association. Summer ice is only offered at O'Brien.

Figure 3: Delaney and O'Brien Rinks – Chestnut Hill Developments Recreation Complex





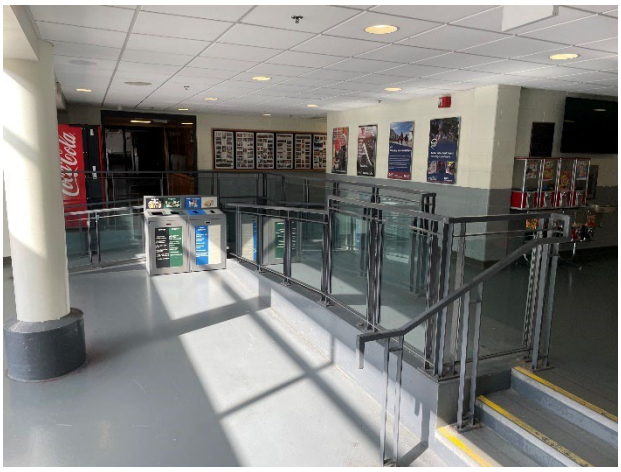
Don Beer Arena

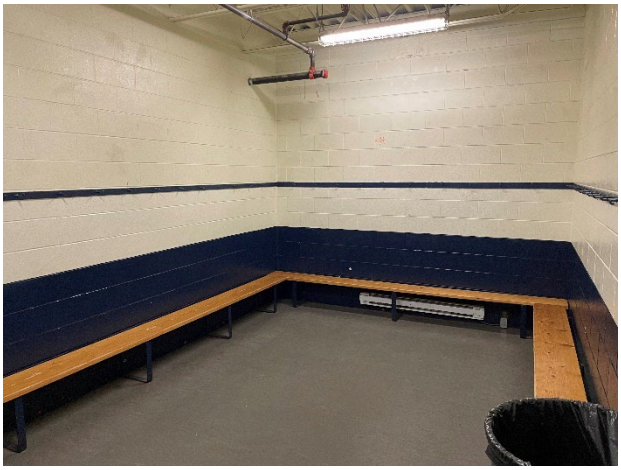
Don Beer Arena provides three (3) pads and is located south of Highway 401 in the City's Brock industrial and light commercial neighbourhood (940 Dillingham Road). The facility is also used for ball hockey and lacrosse in the summer months. The original pad was built in 1967, a second rink added in 1972, and expanded to include a third ice pad in 2003. Accessibility and green improvements were undertaken in 2011, marking the last major renovation. Each ice pad is supported by amenities including change rooms, referee/coach rooms, storage, spectator seating, and concessions. It is worth noting that Rinks 1 and 2 share a refrigeration system, while Rink 3 has its own.

The facility does not offer the level of amenity or comforts that people are looking for in today's recreational facilities such as walking tracks, larger dressing rooms, and extended heated viewing areas. Playing surfaces are not to today's standards and all rinks are below a standard NHL size (200 x 85 feet). Current rink sizes are: Rink 1 – 185 x 85 feet; Rink 2 – 185 x 85 feet; and Rink 3 – 190 x 85 feet. Long term direction is needed for the arena as there have been few recent investments into the facility and it is showing its age.

The facility's location in an industrial area not on a public transit route also creates accessibility challenges for some users. Further, the arena is not part of a multi-use facility like CHDRC, further limiting its appeal and efficiencies. Furthermore, the Don Beer Arena parking lot is almost entirely situated on lands leased from Hydro One, which adds to the annual operating cost (the lease is approximately $100,000 annually and is subject to inflation indexing). Hydro One has also requested that the City of Pickering invest in a storm water collection program for the parking area, which will prove to be an expensive endeavour. In speaking with City of Pickering staff, there is currently no solution to rectify this issue due to design/capital costs and on-site logistical challenges. There are no funds identified currently in the capital budget to address this issue (estimated at $3+ million).

Figure 4: Don Beer Arena





2.2 Local Arena Utilization

The City's Ice Allocation policy (prepared in 2013 and revised in 2018) contains several directives, including: (a) meeting the needs of existing users whenever possible; (b) maximizing the use of existing facilities; (c) maintaining a high level of fiscal responsibility to the residents of Pickering; and (d) providing for the development of new users and user groups. The policy applies to the weekly allocation of ice time, beginning on the 3rd Saturday of September and extending for 28 weeks. The policy aims to allocate ice times in an equitable, transparent, and consistent manner that prioritizes City program rentals, followed by affiliated organized minor and adult users, Junior A teams, schools, and other users.

The designation of prime-time ice is determined by the City of Pickering and posted prior to the start of the ice allocation process for each coming season. Special event and tournament ice requests are limited to three consecutive days. Weighting factors for ice times are employed in the allocation process and are based on age, skill level, number of players per team, and the number of teams on the ice. The policy states that residency requirements may apply to the determination of ice allocation and that groups are required to submitted registration figures annually.

The City's parameters for prime and non-prime time ice are defined below:

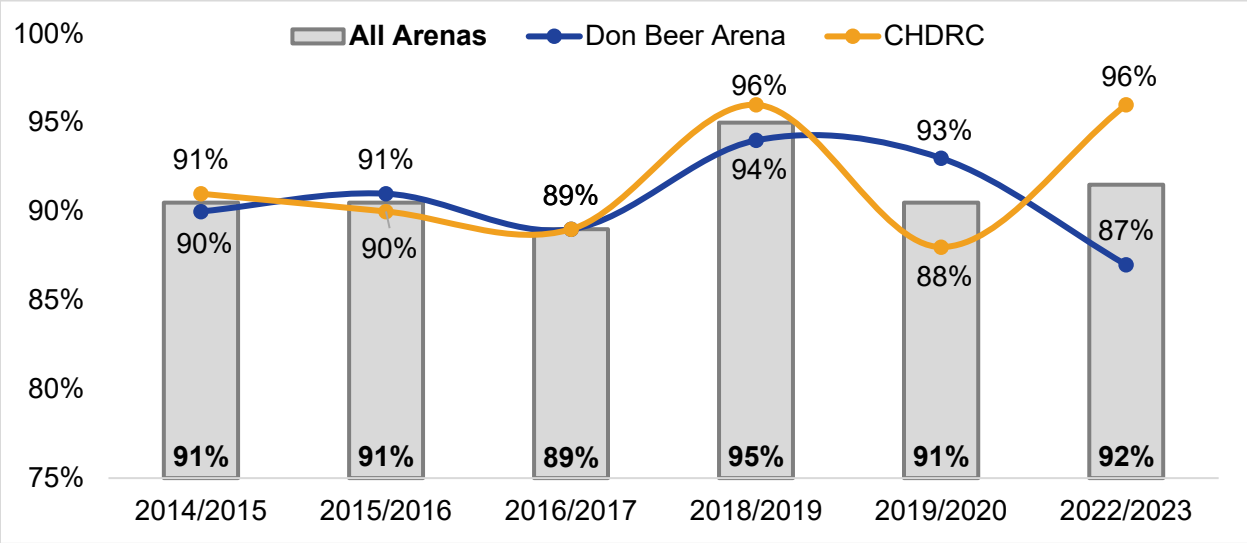
Table 1: City of Pickering Definition of Prime Time, Shoulder, and Non-Prime Time Hours

Days of the Week	Prime Time Hours	Non-Prime Time Hours	Total
Monday to Friday	5:00 pm – 11:00 pm	6:00 am – 5:00 pm	n/a
Saturday and Sunday	8:00 am – 9:00 pm	6:00 am – 8:00 am 9:00 pm – 11:00 pm	n/a
Total Weekly Hours per Rink	56 hours	63 hours	119 Hours
Total Weekly Hours across 5 City Rinks	280 hours	315 hours	595 Hours
28 Weeks across 5 City Rinks	7,840 hours	8,820 hours	16,660 Hours

Ice pad usage is the strongest during prime-time hours and this will be the focus of the ice pad needs assessment. While municipal programming, public skating, and community access are important aspects of arena use, some of these opportunities take place during non-prime time hours and when ice times are generally not booked for rentals. An estimated 11% of non-prime hours are used on a weekly basis – this is the time that youth are in school and many adults are working or otherwise unavailable, thus demand is quite low.

Peak week usage data provided by the City indicates that in 2022/23, 92% of available prime-time arena hours were utilized. This remains slightly below the 95% level experienced pre-pandemic (2018/19). At 96%, prime-time usage is strongest at the Delaney and O'Brien Rinks (CHDRC). However, prime time rentals have been declining at the Don Beer Arena, down from 94% in 2018/19 to 87% in 2022/23. This suggests waning demand for ice rentals, particularly at the older Don Beer Arena.

Figure 5: Summary of Prime-Time Arena Utilization, 2018/19 to 2022/23 (City of Pickering)



Note: 2020/21 and 2021/22 data (from during the COVID-19 pandemic) is not included.
Utilization includes prime time only during November and February (peak times).
Source: City of Pickering, 2023.

Comparatively, an analysis completed by the Town of Ajax in 2019 for their Recreation and Parks Master Plan indicated that this community was using 79% of peak hours at the time. More recently, with the amalgamation of minor hockey organizations, the Town of Ajax saw significant turnback of ice from this group and in response has since closed one pad to ice activities (Village Arena).

Discussions with the Town of Ajax suggest that there remains capacity for additional rentals – by their definition, approximately 16% of weekly prime time hours are unallocated in 2023/24.

The City of Pickering has established the following priority list of non-profit groups that have demonstrated stability and ongoing viability for the allocation of ice time. The City's allocation policy allows Pickering to recognize a new ice organization or emerging ice sport to provide for unmet community needs from time to time. Ice times may be allocated to enable organizations or groups who have demonstrated that there a need for programs and services.

Table 2: Ice Allocation User Groups – Priority Listing (City of Pickering)

User Groups – Priority Order for Access to Ice Time
1. City of Pickering Programs (includes leisure skate and instructional programs)
2. Affiliated Minor Associations, Organizations and Groups
3. Junior A – Pickering Panthers (outside of contract allocation on Delaney)
4. Boards of Education, elementary, secondary, LOSSA, seasonal
5. Occasional, non-affiliated, non-resident and commercial users

The table below illustrates the typical distribution of ice time for each user group from the current season (2023/24) in the City of Pickering. Approximately 88% of these hours are prime time (an estimated 257.5 hours), with 12% being non-prime (an estimated 34.25 hours). Minor changes in allocation can be expected from week to week.

Table 3: Weekly Ice Utilization (Prime and Non-Prime Hours), 2023/24 (City of Pickering)

Organization	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
Ajax Pickering Minor Hockey Association	13	16	10	13	10	30	31	**123**
Durham West Girls Hockey Association	7	1	1.5	5	2	5	10.5	**32**
Ajax Pickering Ringette Association	-	-	8	-	-	7	-	**15**
Pickering Skating Club	2	3		3		2	3	**13**
Pickering Panthers Jr A Hockey Club	1	2	2	2	2	-	3	**13**
Pickering Oldtimers	-	-	6.25	-	-	-	8.5	**14.75**
City of Pickering	6.5	5	5	2	6	2	3	**29.5**
Others	8	7.5	5.5	10	11.5	6.5	2.5	**51.5**
Total	**37.5**	**34.5**	**38.25**	**35.0**	**31.5**	**52.5**	**61.5**	**291.75**

Source: City of Pickering, 2023.

Based on current schedules and allocations, approximately two-thirds (67%) of ice time is used by youth-serving ice sport organizations (largely boys and girls minor hockey), 23% is allocated toward adult or other user groups, and 10% is used for City of Pickering programming (public skating, etc.).

Arena schedules in the Town of Ajax were also reviewed to better understand usage in arenas that share the same base of users. Similar allocations between youth and other/adult uses were evident, as were trends in usage, which generally saw a decline in rentals in recent years (highlighted by the closure of one ice pad in 2021). It is also notable that the three cross-municipal organizations use different proportions of ice time

in each community, with boys' minor hockey generally receiving more ice time in Pickering and girls' minor hockey receiving more time in Ajax.

However, each municipality accommodates an equal share of total usage from these three groups combined in proportion to their arena supply (Pickering at 55% with 5 rinks and Ajax at 45% with 4 rinks).

Table 4: Share of Weekly Ice Rentals for Regional Youth Ice Sport Organizations, 2023/24

Organization	Usage of City of Pickering Arenas (5)	Usage of Town of Ajax Arenas (4)	Total
Ajax Pickering Minor Hockey Association	60%	40%	**100%**
Durham West Girls Hockey Association	41%	59%	**100%**
Ajax Pickering Ringette Association	58%	42%	**100%**
Total	**55%**	**45%**	**100%**

Lastly, there is little conclusive evidence that the closure of the Art Thomson Iceplex has led to increased demand for municipal arenas from adult-serving groups. While the Town of Ajax is accommodating more private rentals during prime time, this may also be a function of additional availability due to the decline in rentals from boy's minor hockey. As per the City of Pickering's ice allocation policy, rentals to adult-serving and commercial groups are attributed the lowest priority, yet some prime-time and ample non-prime time hours remain available for these and other groups.

2.3 Local Participation

Recent and known historical registration numbers for local ice sport organizations are noted below. A focus is placed on youth-serving organizations as these groups are the predominant users of prime time ice.

In 2023/24, there were approximately 2,225 youth registered within local minor ice sport organizations using Pickering arenas; several of these groups are also served by arenas in Ajax.

Of this, it estimated that approximately 42% of youth registrants are residents of Pickering, amounting to 925 local registrants. This accounts for approximately 5% of all youth (ages 5 to 19) living in Pickering. The balance of users live in Ajax and beyond.

In terms of trends, overall registration levels declined by 4% (93 participants) between the 2014/15 and 2023/24 seasons, but have fluctuated from year to year including impacts during the pandemic years. Data for the most recent seasons is also inflated due to mergers between minor sport organizations. Past data from the early 2000s indicates that participation rates were much higher.

More recently, participation declined by 9% from the previous season (208 participants) and has not increased with recent population growth, suggesting that the participation rate in ice sports continues to slowly decline.

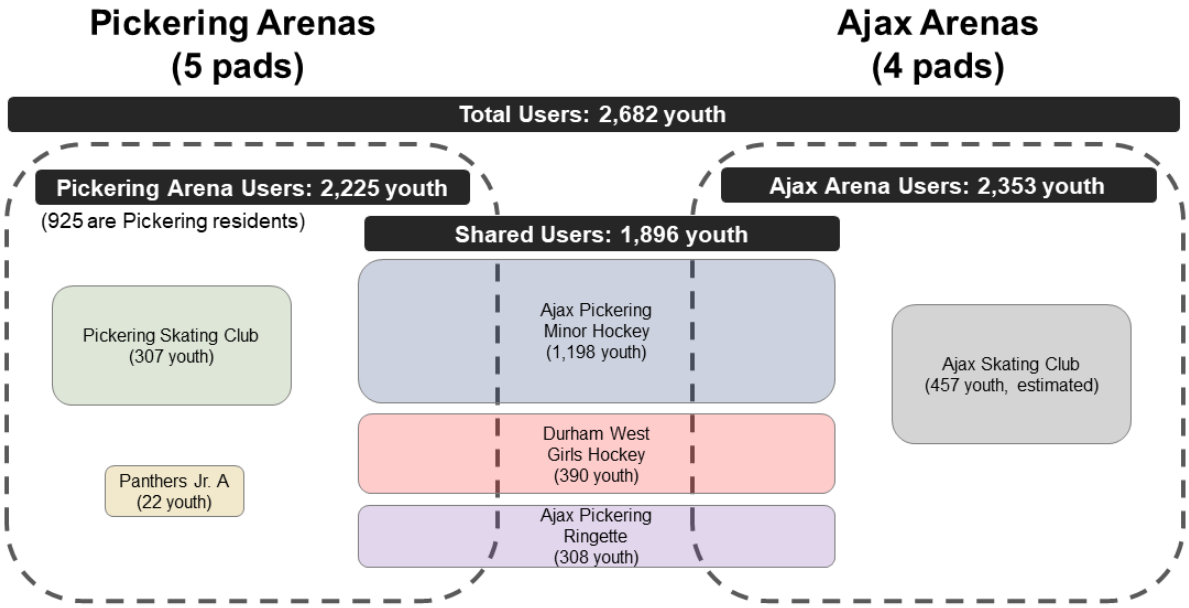
Table 5: Ice Sport Organizations, Total Registration Figures (Pickering, Ajax, etc.)

Primary Youth User Groups	Pickering Residents (2023/24)	Total Members 2014/15	Total Members 2015/16	Total Members 2016/17	Total Members 2022/23	Total Members 2023/24
Ajax Pickering Minor Hockey Association	*44%*	1,026	910	924	1,257	1,198
Durham West Girls Hockey Association**	*20%*	525*	480*	425*	383	390
Ajax Pickering Ringette Association	*33%*	300*	300*	303	317	308
Pickering Skating Club	*71%*	445	445	337	454	307
Pickering Panthers Jr A Hockey Club	*n/a*	22	22	22	22	22
Total	**42%**	**2,318**	**2,157**	**2,011**	**2,433**	**2,225**

* estimated; ** excludes seniors program (age 18+)
Source: City of Pickering, minor sport organizations

As noted, each of the first three ice sport organizations identified above are also served by arenas in Ajax. Not shown in the table is the Ajax Skating Club, which is also identified as a core user by the Town of Ajax. The Town's Recreation and Parks Master Plan notes a registration level of 457 skaters in 2019, which has been used for assessing youth registration across both Pickering and Ajax (for a total of 2,682 youth participants).

Figure 6: Youth Ice Sport Registration Figures, City of Pickering & Town of Ajax (2023/24)

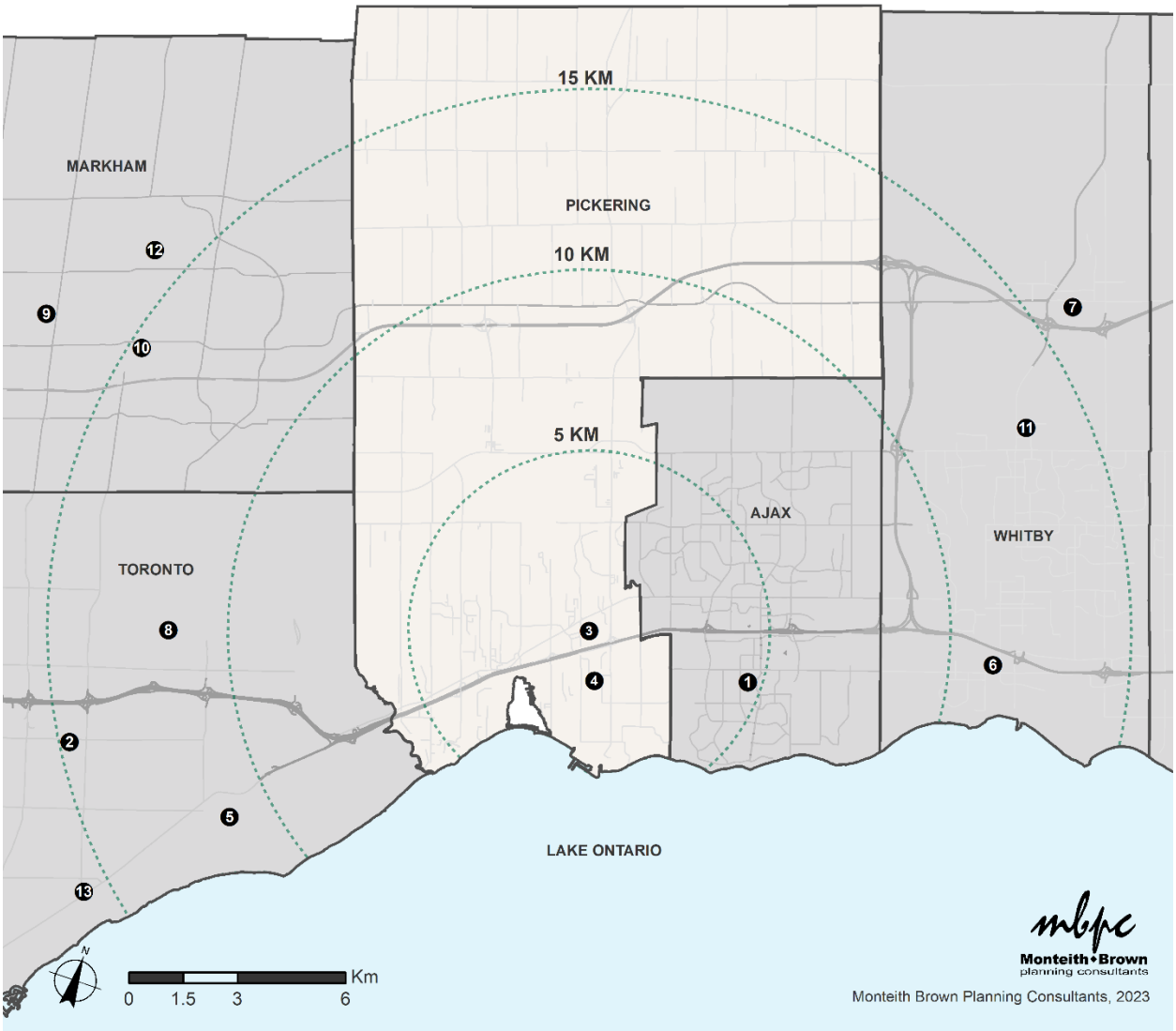


2.4 Regional Arena Inventory

The following map illustrates the locations of other arenas in adjacent municipalities.

Figure 7: Regional Inventory of Arenas

1 Ajax Community Centre (4)
2 Centennial Recreation Centre - Scarborough (2)
3 Chestnut Hill Developments Recreation Complex Arena (2)
4 Don Beer Arena (3)
5 Heron Park Community Centre (1)
6 Iroquois Park Sports Centre (6)
7 Luther Vipond Memorial Arena (1)
8 Malvern Recreation Centre (2)
9 Markham Centennial Community Centre (1)
10 Markham Village Community Centre (1)
11 McKinney Centre (3)
12 Mount Joy Community Centre (1)
13 Scarborough Village Recreation Centre (1)



In general, Pickering is providing ice pads at a similar rate as the comparator group – one ice pad per 20,600 residents in Pickering, compared to an average of one ice pad per 20,015 persons elsewhere. Pickering's provision rate is a little more favourable when one examines the youth population only (1 per 3,400 youth in Pickering compared to 1 per 3,750 youth elsewhere).

With 2,225 youth registrants in 2023/24, Pickering is providing one ice pad for every 445 youth registrants. However, it is estimated that only about two-fifths (925) of these participants are Pickering residents. When the supply of arenas in Ajax is included in this equation, the overall level of service changes to one ice pad per 298 youth participants between Pickering and Ajax as many participants are served by facilities in both communities. The regional nature of Pickering/Ajax minor sports makes it difficult to compare to other jurisdictions with registration boundaries that more closely align with their municipal boundaries.

Table 6: Regional Arena Inventory and Provision Rates

Municipality	Estimated Population	No. of Ice Pads	Provision Rate (all ages)	Provision Rate (ages 5 to 19)	Youth Registrants	Registrants per Ice Pad
Pickering	**103,000**	**5**	**1:20,600**	**1:3,400**	**2,225*** (2023/24)	**445***
Ajax	126,666	4	1:31,700	1:6,200	2,353* (2023/24)	588*
Clarington	116,346	7	1:16,600	1:2,800	1,981 (2022-23)	283
Oshawa	191,600	10	1:19,160	1:3,400	2,240 (2022/23)	320
Whitby	138,501	11	1:12,600	1:2,600	4,840 (2019/20)	440
Comparator Average	**143,278**	**8**	**1:20,015**	**1:3,750**	**2,854**	**408**

Note: The Town of Ajax recently closed a single pad arena due to low demand (Village Arena)
* Includes several organizations that operate in a regional catchment area also serving non-residents.

2.5 Population Factors

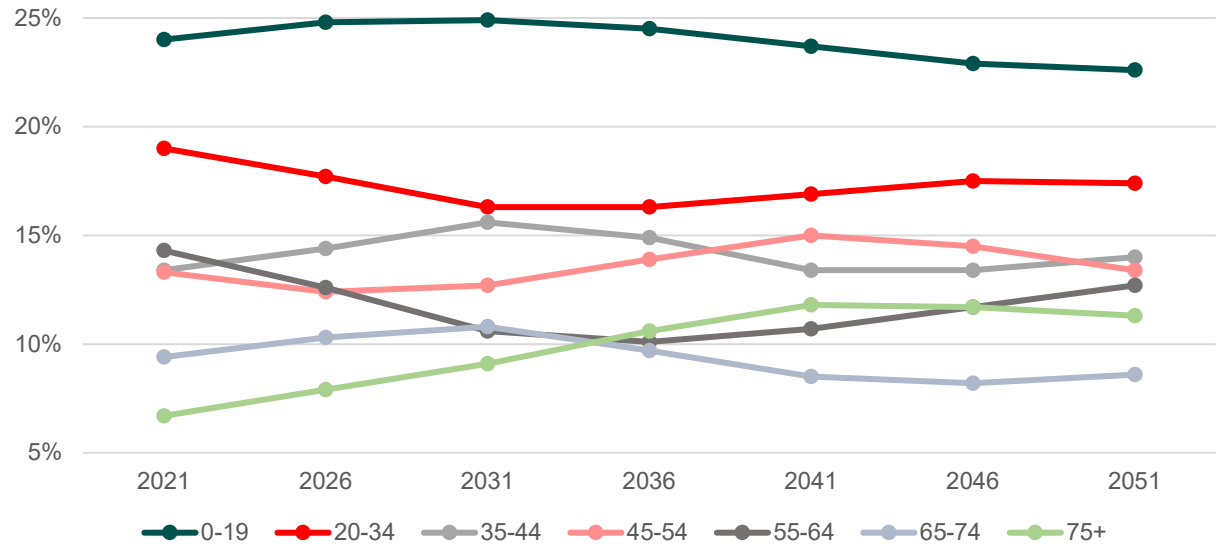
The City of Pickering has an estimated population of 103,000 residents (2024). Between 2016 and 2021, the City demonstrated a growth rate identical to Durham Region (8%). Over the last ten years, Pickering's population had grown the most amongst seniors aged 75 and over by 43%, older adults aged 55 to 74 by 38%, young adults aged 20 to 34 by 23%, and children aged 0 to 9 by only 19%.

Looking ahead, Pickering is set to undergo substantial growth. **Over the ten-year projection period of this study (2024-34), the City is projected to grow to approximately 149,000 persons – growth of 45%.** By 2042, the City's population is forecasted to grow to 185,044 – growth of 80%[1].

Planned population growth is allocated to new communities and strategic growth areas, including the Seaton community, which will account for 70,000 new residents at build out. There are currently no municipal indoor recreation facilities or arenas in this area, though a new recreation complex is planned in the short-term. The City has recently initiated a secondary plan for Northeast Pickering, which is being planned for approximately 45,000 residents but is beyond the 10-year horizon of this Arena Strategy.

While population growth will lead to more children and youth in Pickering (the age group that is the predominant user of arenas), this cohort is forecasted to grow at a slightly slower rate than the rest of the population beyond 2034.

Figure 8: Durham Region, Total Population Forecast Shares by Major Age Group, 2021 to 2051



Source: Region of Durham, Region-Wide Growth Analysis Technical Report (June 2021)

Pickering's population is also diverse, with 52% represented by visible minorities and 12% speaking non-official languages (2021 Census). Recent immigrants, referring to individuals who first obtained landed immigrant or permanent resident status between 2016 and 2021, represented 2.8% of Pickering's residents in 2021. Pickering residents who are newcomers to Canada are more likely to reside in growing areas such as Seaton and intensifying areas closer to Highway 401.

[1] City of Pickering. Detailed 20 Year Population Forecast. March 2023.

These indicators of Pickering's diversity may have an influence on demand if newcomers are more likely to choose other recreation activities over participating in arena programs and sports.

2.6 Arena Participation & Ice Sport Trends

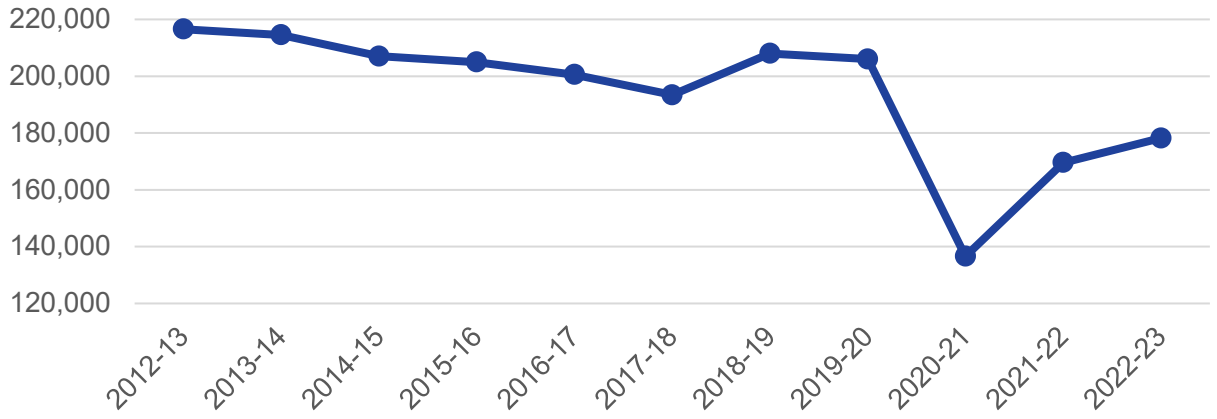
Communities across Canada have experienced a decline in ice sport participation over the past several years. Understanding trends at the national, provincial, regional, and local level can help anticipate needs for arenas. This section explores current and emerging trends in ice sport participation that could affect the demand for arenas in Pickering.

- Declining Participation in Ice Sports
- Growing Emphasis on Skill Development and Competition
- Narrowing Perception of Prime Time
- Uncertain Impact of Hockey Canada Scandals
- Female Sport Participation May be Declining After Years of Growth
- Other Activities are Emerging and Creating Greater Diversification Amongst Sports
- Partnerships can Offer Opportunities to Share Risks and Attract New Markets

Declining Participation in Ice Sports

Youth hockey registration in Ontario has generally declined, with nearly 178,190 registrants in 2023, representing 7.5% of all Ontario youth (aged 5 to 19 years). This is an 18% decline in registration since peaking in the 2012-13 season. This can be linked to several factors, such as the high cost of hockey, concerns over safety, competing interests, aging populations, the uncertain impact of Hockey Canada scandal and competition from leagues/organizations that are not sanctioned by Hockey Canada.

Figure 9: Youth Hockey Registration in Ontario, 2012/13 to 2022/23



Source: Hockey Canada Annual Reports. Includes players registered in youth hockey (U7 to U21).
Note: Player registration was negatively affected in 2020/21 due to COVID-19 and is still recovering.

Since the 2020/21 season when the COVID-19 pandemic first began and registration was at its lowest, youth hockey registration in Ontario has increased by 30%, but is still 14% below 2019/20 registration levels. There is also a risk that young children that would have been eligible to begin learn-to-play hockey or skating initiation programs during the pandemic have missed their opportunity due to program/facility shutdowns, and may never pick up the sport. This could lead to further challenge sin regaining past participation levels and create a "void cohort".

This nation-wide decline in participation is most prevalent amongst boys (but increasingly being seen in girls' participation as well) and can be attributed to several factors, such as:

- changing demographics factors such as an aging of the population, immigration from countries that do not play ice sports, growing polarization between household incomes, etc.;
- significant and escalating costs borne by households (for equipment, travel, ice rentals);
- lack of time for households to commit to sport, especially at the competitive/rep level;
- difficulties in finding and/or compensating qualified coaches and volunteers;
- volunteer burnout leading to shortages at the executive level and among parent-coaches; and
- growing competition from other sports (e.g., indoor soccer, basketball, etc.) as well as unstructured, self-scheduled activities.

On the aforementioned point about affordability, research from 2018 found that the cost of children's activities put a strain on the finances of a majority (55%) of Canadian parents. As many as one in three (32%) Canadians used debt to fund the extracurricular activities of their children. Hockey topped the list as the most expensive extracurricular activity (an average cost of nearly $750 annually) and the research found that parents were increasingly less likely to enroll their children in hockey as a result.[2] These results are compelling considering today's challenging economic climate.

Growing Emphasis on Skill Development and Competition

Demand remains strong for competitive development experiences and opportunities. The higher the level of play and the greater the focus on athlete development, the more time that is required for practices, games, and camps. While this "professionalization" of minor hockey helps to support skill development for many athletes, it also comes at a cost (in terms of both time and money) that can raise barriers for many families. Several sport governing bodies in Canada are implementing the Long-Term Player Development (LTPD) model that emphasizes player growth, maturation, and development. This model identifies the needs of players at various stages of their development and addresses the appropriate stages for the introduction and refinement

[2] Ipsos. One in Three (32%) Families Going into Debt to Fund their Children's Extra-Curricular Activities, Up 5 Points from Last Year. 2018. https://www.ipsos.com/en-ca/news-polls/back-to-school-2018

of technical, physical, mental, and tactical skills. Pickering's Learn to Skate programs are currently experiencing high demands with waitlists.

The adoption of the LTPD model has transformed the way many ice organizations deliver programming, such as a greater emphasis on skill development. Additionally, in 2018, Hockey Canada mandated that novice participants play half ice (or cross ice) to boost fun and skill development. The standards of play mandate minimum thresholds for game and practice time, which can be particularly challenging for the higher levels of play that require greater access.

Narrowing Perception of Prime Time

Historically, municipal arenas experienced strong or steady ice usage during the early mornings or late-night hours. However, usage profiles of arenas – in Pickering and across Ontario – have changed in recent decades. Families are less willing to use early morning weekday ice and interest in late night times for adult hockey has declined. Some communities are also challenged with filling weekend hours. There are more tournaments and a focus on skill development, which has also placed a premium on access to prime-time ice, particularly during the week. In short, the prime-time window is shrinking, which is making it more difficult to make use of shoulder and non-prime hours.

Uncertain Impact of Hockey Canada Scandals

Hockey Canada – our nation's governing body for hockey – has been under intense scrutiny recently due to several sexual assault claims and settlements, to the point that the Canadian government froze its federal funding in June 2022. This followed calls in recent years for improved player safety (programmatic changes have since been made to reduce the risk of concussion) and a culture of inclusion and acceptance (a Policy Paper on Anti-Racism was released in 2020).

Canadians are concerned about these issues and they may be impacting their choices to participate in the sport. A public opinion survey from 2021 (prior to the recent sexual assault allegations) found that nearly two-thirds (63%) of players and coaches believe that hockey has a culture problem with players bullying kids outside of the rink. This survey also found an issue with affordability, with 88% of Canadians indicating that organized hockey is too expensive for lower-income people to play.[3]

A more recent survey found that more than half (56%) of Canadians with a connection to youth hockey see sexual misconduct in hockey culture as a major issue. While most Canadians are supportive of actions announced so far (Hockey Canada prepared an open letter in July 2022 promising change and outlining new complaint mechanisms and

[3] Angus Reid Institute. Game Misconduct: Canadians may love their hockey, but they also see serious problems with its culture. May 2021. https://angusreid.org/hockey-culture/

a review plan), only one-quarter (27%) are confident that the environment will improve for women around the game.[4]

Female Sport Participation May be Declining After Years of Growth

Although hockey registration is largely male, participation in girls' hockey had been rising due to growth in minor and international sport opportunities (such as women's hockey), changing lifestyle and personal commitments, and gender equity efforts that remove participation barriers for females. In Ontario, girls' hockey represented one-fifth (21%) of all participants affiliated with Hockey Canada for the 2021/22 season, which is a 5.3% increase from the 2012/13 season ten years prior.[5]

However, there are signs that this growth may be levelling off or declining. Starting in late adolescence, one-in-three women leave sport (including, but not limited to, ice sports) as compared to one-in-ten boys.[6] This trend has worsened since the onset of the pandemic, when it was reported that over 93% of female sport participants were negatively impacted (specifically young women ages 6 to 18 years old). The research suggests that young women are participating substantially less than they did pre-pandemic and that 25% were non-committal in returning to sport after the pandemic.[7] Among the barriers cited, girls stated low levels of confidence, low body image, lack of skills and feeling unwelcomed in a sport environment. To bolster participation among women, the Federal government established a goal of achieving equity in sport participation by the year 2035.

Other Activities are Emerging and Creating Greater Diversification Amongst Sports

The popularity of recreation and sport activities changes with time and can be affected by several factors, most notably socio-economic characteristics, lifestyle trends, and the exposure and accessibility of the activity. National registration figures indicate that, where once ice hockey and baseball were dominant, soccer has taken rise since the 1990s. More recently, a national study found that interest in children's activities was beginning to shift away from these sports towards other less formal extracurricular activities, such as music lessons, dance lessons, language classes, and drama classes.[8]

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[4] Angus Reid Institute. Vast majority say Hockey Canada needs new leadership going forward. August 2022. https://angusreid.org/hockey-canada-sexual-misconduct/
[5] Hockey Canada. Annual General Meeting Reports.
[6] Canadian Women & Sport. The Rally Report. 2020. https://womenandsport.ca/wp-content/uploads/2020/06/Canadian-Women-Sport_The-Rally-Report.pdf
[7] Canadian Women & Sport and E-Alliance. COVID Alert Pandemic Impact on Girls in Sport. 2021. Retrieved from: https://womenandsport.ca/wp-content/uploads/2021/07/COVID-Alert-final-English-July-2021.pdf.
[8] Ipsos. One in Three (32%) Families Going into Debt to Fund their Children's Extra-Curricular Activities, Up 5 Points from Last Year. 2018. https://www.ipsos.com/en-ca/news-polls/back-to-school-2018

In terms of ice sports, they have become more specialized over recent years with a growing focus on skill development and athletic achievement. This has led toward more camps, specialized programs, and service providers, including sport academics and private training providers.

Private training facilities have sprung up in many communities, offering paid instructors that teach the area hockey skills, often on synthetic ice. This had led to growing requests for ice time at municipal arenas from commercial renters representing broad geographic memberships.

Partnerships can Offer Opportunities to Share Risks and Attract New Markets

Throughout Ontario municipal recreation departments are increasingly challenged to provide and maintain top quality facilities, services, and programs within defined budget envelopes. And as financial pressures mount and the need for cost containment rises, many departments are examining new and creative service provision methodologies including developing relationships with outside entities.

There are three types of relationships that are generally available to municipalities interested in pursuing alternative approaches to deliver, operate, or program recreation and sport infrastructure:

- A Public/Private Partnership (P3) – a relationship between the municipality and a private sector entity;
- A Public/Public Partnership (P2) – a relationship between the municipality and public sector agency such as another municipality or a school board;
- A N-F-P Partnership – a relationship between the municipality and a not-for-profit organization such as a local sports organization.

Some municipalities are gradually shifting from a traditional direct delivery model to one of these structured relationships. Within certain jurisdictions creative approaches has resulted in:

- the development “core facilities” that would not have been possible had the municipality addressed the project on its own (e.g., Toronto’s arrangement with the Ford Performance Centre quad pad arena);
- the provision of “non-core” facilities that represent new levels of service available to local residents (e.g., Pickering’s arrangement with the Football Club to operate the Pickering Soccer Centre);
- operating results that are beyond the usual performance thresholds of a municipally delivered service (e.g., Hamilton’s arrangement with a private arena operator for the Mohawk 4 Ice Centre); and
- contracting out operations to a third-party service provider (e.g., London’s arrangement with the YMCA for the Stoney Creek YMCA and Community Centre).

2.7 Arena Provision & Design Trends

This section explores the following existing and emerging arena provision trends:

- Approaches to Arena Provision in Other Communities
- Aging Arenas are a Growing Challenge
- Repurposing of Surplus Arenas
- The Rise of Multi-use Recreation Facilities as Community Hubs
- Inclusivity of Persons with Disabilities and Barrier Free Facilities
- Climate Change and Green Designs

Approaches to Arena Provision in Other Communities

Changing demands and participation levels, evolving facility requirements, and a growing stock of facilities have created surplus ice time in several communities. Certain municipalities have explored adaptive re-use of redundant arena facilities, or closed arenas outright. In the City of Toronto, the range of other recreational activities, availability of private rinks, changing demographics, and rising costs of ice sport participation have led the City to plan for the gradual reduction of the number of municipal ice pads, despite Toronto's population being expected to grow by 500,000 by 2041.[9] Similar plans are also in place in communities such as Mississauga, while those municipalities that are planning new facilities over the long-term (e.g., Hamilton) are doing so at a rate much lower than population growth.

This is elaborated upon in the following chart that shows the current rate of ice pad provision across a selection of large urban municipalities, as well as future plans for arena provision. Pickering is currently providing ice pads at a higher rate compared to other more urbanized municipalities. Looking to the future, most municipalities have plans to expand their arena supply to address significant population growth, but will do so at a much lower rate (approximately 1 ice pad per 112,000 residents).

[9] Matt Gurney. End of an ice age, Part 1: Is youth hockey dying? 2020. https://www.tvo.org/article/end-of-an-ice-age-part-1-is-youth-hockey-dying

Table 7:Ice Pad Provision Rates and Future Planning, Selected Large GTAH Municipalities

Municipality	Current Ice Pad Supply	Ice Pads per Capita	Future Provision Target	Future Ice Pad Needs	Anticipated Population Growth	New Arenas Per Capita
Column:	A	B	C	D	E	F
Source:	Master Plan	Pop.'n ÷ Column A	Master Plan	Master Plan	Master Plan	Column E ÷ Column D
Pickering	**5**	**1:20,000**	**tbd**	**tbd (2022-2042)**	**85,044**	**tbd**
Ajax	4	1:31,700	1:800 participants	0-2 (2021-2031)	20,000	n/a
Brampton	20	1:32,800	1:800 participants	0 (2017-2031)	237,000	n/a
Hamilton	25	1:23,800	1:4,500 youth residents	3 (2021-2051)	236,000	1:78,700
Markham	10	1:33,900	1:400 youth participants	1 (2022-2031)	81,900	1: 81,900
Mississauga	25	1:28,700	1:37,500 residents	0 (2019-2028)	50,000	n/a
Oakville	13	1:16,400	1:650 youth participants	1 (2017-2031)	52,600	1:52,600
Oshawa	10	1:17,500	1:500 youth participants	0 (2023-2031)	38,000	n/a
Richmond Hill	8	1:25,300	1:27,000 residents	1 (2022-2031)	39,000	1:39,000
Toronto	65	1:43,000	1:50,000 residents	1 (2019-2038)	450,000	1:450,000
Vaughan	8	1:40,400	1:500 youth participants	2 (2018-2031)	100,000	1:50,000
Whitby	11	1:12,600	1:750 youth participants	1 (2023-2031)	32,500	1:32,500
Average	**18**	**27,827**	**n/a**	**1**	**1:121,500**	**1:112,000**

Source: Community-specific Recreation Master Plans

Aging Arenas are a Growing Challenge

Communities across Canada are experiencing similar provision and design trends as many facilities are reach the end of their lifecycles. The 2019 Canadian Infrastructure Report Card reported that 39% of Canada's municipal arenas and pools are in fair to very poor condition. Many of these facilities were built between 1956 and 1980 whose

age and/or deferred infrastructure renewal/maintenance activities have accelerated the number of facilities in need of replacement.

Municipal approaches to addressing these aging / end of life cycle arenas include renewal projects, converting facilities into dry pads for other recreational uses, or supporting the facilities demand by replacing with a more efficient twin or quad pad. Arena users and spectators are drawn to new facilities that offer modern conveniences. New facility designs typically involve: barrier-free spaces; larger and gender-specific dressing rooms; warm viewing areas; multi-pad arenas that generate efficiencies; amenities such as walking tracks and shooting pads; and more. Multi-pad arenas offer economies of scale in operation, are more convenient for user groups, and enhance tournament and event potential.

The Don Beer Arena, originally built over 50 years ago, is a local example of a facility with several building components that have reached or are approaching the end of their useful life. Certain grant and shared funding programs have been introduced by senior levels of government over the past 15 years to renew aging recreation facilities including the 2011 RInC program, the Building Canada Fund, and most recently the Investing in Canada Infrastructure Program. While these programs have gone a long way toward reducing the infrastructure deficit, significant shortfalls remain in municipalities across the country.

Repurposing of Surplus Arenas

Changing demands and participation levels, evolving facility requirements, and new multi-pad arena projects have created surplus ice time in several communities. Certain municipalities have explored adaptive re-use of redundant arena facilities for purposes such as:

- community centre space (e.g., Kingsdale Community Centre in Kitchener)
- indoor soccer (e.g., Syl Apps Community Centre in Paris, Ontario)
- gymnasiums (e.g., Ken Giles Recreation Centre in Brampton)
- indoor playgrounds (Vancouver)
- indoor skateboarding (e.g., Zurich, Ontario)
- dry floor activities / theatre venue (New Hamburg Arena in Wilmot Township, Alliston Arena in New Tecumseth)
- temporary storage (e.g., AMA Arena in Amherstburg, Ontario – since demolished)
- commercial or institutional uses (e.g., former Maple Leaf Gardens in Toronto)

Other examples of adaptive re-uses include curling rinks, indoor tennis, box lacrosse, and roller derby. Repurposing can extend the life of an existing facility but can be just as costly as building new given the need to refurbish and reconfigure building components. As a result, the most common response in Ontario has been to decommission and demolish surplus arenas.

The Rise of Multi-Use Recreation Facilities as Community Hubs

A community hub is a central access point for a range of needed health and social services, along with cultural, recreational, and green spaces to nourish community life. A community hub can be a school, neighbourhood centre, an early learning centre, a library, an elderly persons' centre, a community health centre, an old government building, a place of worship, or another public space. This concept is gaining traction across Ontario as it offers tremendous social benefits, strengthens community cohesion, and fosters enhanced quality of life by providing a central location to deliver a range of services.

In an era of user convenience and growing emphasis on cost recovery, many municipalities are centralizing recreation services into multi-use facilities. There are a range of benefits of multi-use facilities including the creation of a destination where all household members can gather and engage in recreation activities, thereby contributing to sport development, tourism, and operational efficiency. This is part of what makes the Chestnut Hill Developments Recreation Complex such a destination for Pickering's residents.

Most recent arena projects across Ontario have been in the form of multi-pad and multi-use venues. While the specific nature and degree of above noted benefits will depend on local circumstances, facility design and operation, and other factors, there is no denying that multi-use recreation facilities have the potential to generate substantial economic, social, and environmental gains for local municipalities.

Inclusivity of Persons with Disabilities and Barrier Free Facilities

The *Accessibility for Ontarians with Disabilities Act (AODA)* directs municipalities to consider the needs of persons with disabilities through facility design and service delivery. By 2025, municipalities are required to remove all barriers within new and redeveloped municipal facilities, including those related to physical space as well as customer service through training.

The City of Pickering 2021 to 2025 Five Year Accessibility Plan contains several actions to improve accessibility and remove barriers within the corporation, although none are specifically identified for the arenas. The uncertainty surrounding the future of the Don Beer Arena has limited the City's investment until a path forward is determined for that facility.

Potential Impacts of Climate Change

Environmental concerns are often a top-of-mind issue among Canadians as there is an increasing need to maximize the efficient use of resources. Relative to ice sport participation and arena design and operations, climate change is contributing to:

- Increased outdoor air temperatures and/or rain leading to the following challenges for indoor ice arenas:

    - added loads on refrigeration equipment to withstand the warmer temperatures;
    - having to increase capacity with cooling towers/condensers on warmer degree days in the winter;
    - added loads on dehumidification equipment inside of ice pad envelopes; and
    - trouble controlling indoor facility temperatures due to the swing of outdoor air temperatures; fluctuation is hard to control and creates challenges with regulating comfort levels.
- Longer than typical usage of outdoor recreation amenities. For example, racquet sport courts are being used into the winter and earlier in the spring, which adds to the workloads of recreation and parks staff that typically would be operating arena facilities during these seasons.
- Reduced opportunities for natural ice outdoor ice rinks due to warmer temperatures and shorter seasons, impacting casual skating activities and opportunities for new participants to try ice skating in a non-controlled environment. This is coupled with increased operating costs and greater volatility for refrigerated outdoor ice rinks.

Many municipalities have demonstrated environmentally conscious awareness in the design of new facilities that utilize state-of-the-art technologies to enhance environmental efficiency. Pickering has taken steps to reduce its environmental impact through its Corporate Energy Management Plan.

3.0 Stakeholder Engagement

A public and stakeholder consultation program was launched to gather input and critical insights relating to this Strategy and the Recreation & Parks – Ten Year Plan. Several community consultation tools were utilized to solicit input from members of the public, arena stakeholder groups, City Staff, and Council. Tactics consisted of surveys, workshops, open houses, and youth engagement.

3.1 Input from Arena Organizations

To gain insight into local ice demand factors and to inform strategies for the long-term provision of ice surfaces, City of Pickering's primary arena user groups were consulted through a workshop. This virtual session was held on September 26th, 2023 and was facilitated by the consulting team. Topics of discussion included:

a) participation trends and barriers;
b) organizational challenges;
c) facility usage;
d) existing facilities;
e) future needs; and
f) priorities and implementation.

The following organizations were contacted to provide input through the workshop:

- Ajax Pickering Minor Hockey Association (APMHA)
- Durham West Girls' Hockey Association (DWGHA)
- Pickering Skating Club
- Ajax Pickering Ringette Association
- West Durham Minor Lacrosse Association
- Pickering Old-Timers Hockey League (POHL) – did not attend

Note: The following represents the opinions of local ice organizations at the time of the consultation. Confirmation of ice utilization and future needs is addressed through subsequent sections of this report; input from ice organizations is one of several inputs used in the future demand model.

Minor Hockey – Boys

The Ajax Pickering Minor Hockey Association provides all levels of programming, including hockey school, house league, and competitive levels up to AAA hockey (Raiders) to residents of both Pickering and Ajax. The hockey school program is for players aged 4-8 years old. House league currently provides two divisions; U7-U15 and U18/U21. Competitive levels represent U9-U18. The total number of registrants for the minor hockey association in the current year is 1,198 (of which 526 live in Pickering). This is a decline of 59 players from 2022/23 (5%). The group runs three tournaments

out of the Don Beer Arena annually and indicated that there is demand to host more events in Pickering.

Due to the pandemic, the group noted that participants aged 15 and over are slower to return to house league, with some not returning at all. Meanwhile, the younger age groups playing in house league or hockey school have returned much quicker than their older counterparts. Another trend relates to shifting demographics, as the organization is seeing more players with diverse cultural backgrounds and new Canadians that want to get involved, learn, and play hockey. Additionally, the group works hard to keep house league fees low, which has been helpful in attracting more members outside of the local area.

One challenge identified by the group is the location and travel time to access the Don Beer Arena. Many of those living in the central and north areas of urban Pickering find it difficult to drive down Brock Road to reach the arena location. As a result, members have been lost to organizations such as West Hill and Stouffville. Another challenge is a lack of volunteers and difficulty finding people willing to help coach.

Concerning facility usage, minor hockey is generally satisfied with their current ice time provisions. The group does not use ice times during weekday mornings. One suggestion was to better consolidate ice time blocks to allow for more effective scheduling; smaller slots of time can restrict the group's programming.

Minor Hockey – Girls

The Durham West Girls' Hockey Association provides house league and rep hockey programming for females U7 to Senior. At present, the club has approximately 520 participants and has nearly regained its pre-pandemic registration levels. The distribution of participants is approximately 20% from Pickering, 30% from Ajax, and 50% from peripheral communities such as Scarborough, Markham, Whitby, etc. (unlike boys minor hockey, their governing body does not place boundaries on where girls can play). The Association mainly uses Pickering's O'Brien Rink and has tried to consolidate their junior house league program to Pickering, but the group also rents ice time in Ajax.

The association is struggling to maintain its house league programming, which feeds the rep teams. As of 2023/24, only 18% of teams are junior house league. Many older players that had left the organization during the pandemic have not returned and the group is having challenges growing the program locally within Pickering. The club suggested that introducing youth first to floor hockey or CANskate could help to spark greater interest in hockey. Some parents are also hesitant to pay the upfront cost for a sport their child may not like, therefore introducing them into cheaper but essential components of skating may help spark interest.

Concerning facility usage, the group also agrees that larger blocks of ice time together would be more efficient in providing programming over the current schedule. There is enough ice available at the moment, but the time is not always preferable.

Figure Skating

The Pickering Skating Club provides programming such as CAN Skate and STARSkate to those aged 3 years old up to and including adults. There are approximately 307 participants (of which 218 live in Pickering). Two seasons of skating are provided within the fall and winter. Most registrants are ages 6 to 15 years, with only a small group representative of adults. Most members are from the Pickering area, with others joining from Ajax mainly. All classes provided were at full capacity last year, and the organization expects to fill all classes again this upcoming season.

The organization has sufficient volunteers and coaches as its current operations require coaches to be paid and STARSkate participants are required to volunteer as part of their programming requirements. One barrier with facility usage is the number of hours allotted for their organization. As demand becomes greater and classes are already hitting capacity, there are no opportunities to expand programming without more allotted time.

Ringette

The Ajax Pickering Ringette Association provides ringette programs for those aged 5 to 18 and up. They use both arenas in Pickering as well as the arena in Ajax for their programming. Members total up to 308 in 2023/24 (of which 103 live in Pickering). The organization provides opportunities at events for residents to try ringette to increase interest.

Prior to the pandemic there were two ringette organizations, but they have since amalgamated. Registration in younger age groups has been increasing and more members from Ajax have been joining the organization as well. The ringette association provides early bird discounts and a reduction in fees to incentivize people to join and register. They also experience challenges with gaining volunteers and have had to switch back to using paid coaches.

Lacrosse

The West Durham Minor Lacrosse Association provides programming in both the spring and summer. Ajax sport fields are used in the spring months and the Don Beer Arena floor is used in the summer months. The organization contains 6 rep teams with about 100 participants on these teams.

Comments on Existing Arenas

User groups emphasized quality of arenas to a greater extent than expanding the supply, providing several suggestions for improving existing facilities. Upgrades to change rooms to provide gender neutral options was mentioned, as well as providing equipment more suitable for smaller/younger players who do not fit into the standard equipment comfortably. Adding a pro shop at CHDRC was suggested to make it easier for arena users to have access to skate sharpening services. Meeting rooms and retrofitting for media to stream events are a priority to provide opportunities for

competitions or events in Pickering. Don Beer Arena was noted as needing many upgrades to allow for a revenue stream from events. Upgrades include improving washroom and change room sizes, a working sound system, better Wi-Fi and seating, brighter lighting, and a warmup area off the ice for both teams.

Future Facility Needs and Suggestions

Concerning future needs, there were comments about providing sport friendly infrastructure for competitions. This includes a large spectator rink (number of seats were not defined) with all the required amenities, as well as providing enough hotels to host visitors from outside Pickering. Running tournaments provides many user groups with revenue required to run their programs, therefore this is a priority to provide an adequate space for these special events.

3.2 Input from the Community

Several community consultations were held to collect public input into the City's Recreation & Parks – Ten Year Plan. In general, interest in arenas and arena programming was not identified as a key priority through these consultations. Additional detail is provided below.

Community Survey

From the Recreation & Parks – Ten Year Plan community survey, respondents identified the following input related to arenas and related activities:

- Nearly one-quarter (23%) of respondents or their household members participated in indoor recreational skating, ranking 11th out of 42 listed activities. This is a decline from 28% that participated in 2017
- Further, 16% of respondents or their household members participated in hockey or skating, ranking 16th out of 42 listed activities. This is a decline from 25% that participated in 2017.
- More than half (53%) support spending additional public funds to provide more arenas (ice sports) in Pickering, ranking 24th out of 36 responses categories, making it a lower priority overall. This is also a decline from the.
- Demand for casual outdoor skating opportunities consistently ranked higher than indoor ice sports in terms of priority amongst community survey respondents.

Public Open Houses

The following input was gathered on arenas and arena activities through the Recreation & Parks – Ten Year Plan open houses:

- 4% of public open house poll results identified ice sports as an activity they want more of in Pickering (ranking 13th out of 14 options).

- From the sticker-dot matrix engagement boards, arenas (ice sports) were identified as a medium-priority, prioritized by 106 participants (ranked 7th out of 10 options).

Youth Engagement

Pickering youth were engaged through presentations at local schools, online surveys, and focus group sessions. The following input was received relating to arenas and related programming:

- From the youth community survey, 13% of respondents identified that they participated in hockey or figure skating during the past 12 months, ranking as the 22nd most popular recreational activity. Despite this, 29% of youth survey respondents identified they would like to see more arenas for ice sports, ranking as the 4th highest facility priority.
- From the dot-mocracy exercise, arenas (ice sports) were identified as the 4th highest facility by elementary school students and the 9th highest priority by high school students, suggesting that ice sports are more popular amongst children.
- Youth focus group participants identified public skating as a fun way to meeting new people.

3.3 Summary of Key Themes

Several key themes have emerged from the community input provided by participants, categorized below:

Table 8: Summary of Key Themes from Research and Consultation

Finding	Description
1. Arena investment is a lower priority for many Pickering residents.	Pickering residents generally indicated that investment in arenas and the development of new arenas was a much lower priority compared to other facility priorities such as park amenities, swimming pools, gymnasiums, and multi-use spaces.
2. User groups are satisfied with current service levels.	Most user groups are largely satisfied with the City's provision of arenas, indicating that the existing five ice pads are meeting their needs at the present time. No requests for additional ice time were received – groups appear to be getting enough time to meet their needs at this time. Some groups recommended changes to scheduling (or different times) but are satisfied with the overall allocation of time.

Finding	Description
3. Aging infrastructure at Don Beer Arena is a growing concern.	Stakeholders indicated that several upgrades are needed at this facility, including improved changerooms and washrooms, lighting, sound system, Wi-Fi, and a warmup area. The location of this facility also poses challenges for many Pickering residents, particularly those living in growth areas to the north.
4. The pandemic had a negative impact on participation.	Following the pandemic, house league hockey experienced a slower return, particularly amongst older age groups.
5. Participation is becoming more diverse.	Organizations have noted that their participant profiles are becoming more diverse and they are instituting programs to introduce their sports to newcomers.
6. Convenient opportunities will help the City keep up with growth-related needs.	As Pickering grows, local organizations felt that demand will also rise for ice sports. The provision of more arena opportunities in proximity to residents may help organizations searching for more ice time (e.g., figure skating). Some groups also expressed a need for more volunteers to help sustain their operations.
7. Organized ice sports are becoming more regional.	Aside from figure skating, all of Pickering's youth ice sports organizations have amalgamated to some degree with neighbouring Ajax to enhance the level of competition and find efficiencies in the face of declining registration. Some groups prefer to play in certain jurisdictions, creating a "home base" for their operations. An examination of ice schedules indicate that each municipality accommodates an equal share of total usage from these groups in proportion to their current arena supply.

4.0 Operational Assessment

This section examines the condition of existing City of Pickering arena facilities and makes recommendations for their continued operation and programming.

4.1 Review of Existing Arena Condition & Operations

Below is an assessment of the current condition and operations of City of Pickering arena assessments as completed by Largo Facility Management. Observations and recommendations are based on site visits in September 2023, reviews of relevant reports made available by the City, input from stakeholders, discussions with municipal staff, and operational best practices from similar jurisdictions. Arena facilities and associated amenities are described in Section 2.

Chestnut Hill Developments Recreation Complex

The CHDRC contains two indoor ice pads – Delaney and O'Brien. The O'Brien ice pad has been identified by the City as a candidate for renovation and has included funds within the City's 10-year capital plan. The scope of renovations (anticipated for 2027) would include replacement of the slab and boards, change room improvements, etc. In total the City has allocated approximately $10.5 million over the next 10 years within its capital plan for the CHDRC arenas.

The City's Facilities Renewal Study (2024) notes that, as the CHDRC approaches 50 years within the next decade, it would be prudent for the City to begin long-term planning for facility reinvestment or replacement at that time. The entire building has a facility condition index of 0.26 (fair condition), with an overall condition score of 3.09, ranking it as the 15th out of 23 municipal capital assets studied (with the lowest ranking facilities being candidates for disposal).

Our general observations of the CHDRC arenas are as follows:

- Both ice rinks are in very good condition from an operational perspective. Rink staff should be complimented on the facility's upkeep and overall maintenance.
- Both ice surfaces look to be in very good condition during the walk through with ice sport line markings clear and not cut out. It is evident that operations staff take pride in providing a quality ice surface.
- Rink boards and rink glass shielding appear to be in fair condition with spectator safety netting in place as precautionary protection from pucks making their way over the rink glass. Consideration be given to future year capital replacements as it is noted to be budgeted for replacement in 2027 (O'Brien).
- While the main entrance to the rinks is separate from the main entrance of the CHDRC, this has both pros and cons. An advantage is that ice sports can be louder than other types of sports at the CHDRC, so this keeps the added noise of

ice sports away from the quieter recreational activities such as swimming and fitness. Conversely, separate entrances can be confusing for participants and spectators showing up for ice sports and trying to find the rink entrance, as well as limiting for cross-programming.

- Parking would appear to be in high demand at this site, particularly during peak times. As part of its investments in the City Centre, the City is considering several major capital projects that will have implications on parking in the vicinity. The construction of above- and below-grade parking structures will be considered by City Council as part of the City Centre projects.
- Both ice rinks are slightly smaller than NHL regulation; however, this was not raised as a significant concern by user groups during the stakeholder engagement sessions.
- In review of the 2023 operating budget, utility costs appear to be in line with this type of facility.

The City may consider completing a more detailed energy analysis with a focus in achieving Zero Carbon Building Design Standards, which has been a prerequisite for recent grant applications. The analysis should provide solutions to the challenges noted in this facility.

Table 9: Refrigeration Room Assessment, CHDRC Arenas

Observations	Recommendations
Delaney Rink: • Consists of three 50 horsepower compressors. • Refrigeration plant had a refresh in 2004 and again in 2015. • A Desiccant unit services both ice pads. • Service is up to date and well maintained. • System is controlled by a T775 controller utilizing supply and return temps and a slab temp sensor. **O'Brien Rink:** • Consists of multiple compressors that total 200 horsepower. • Refrigeration plant received a refresh less than 5 years ago. • Efficient plant with an abundance of heat recovery available for use. • System is controlled by a T775 controller utilizing supply and return temps.	• Implement infrared red cameras (IRC's) on both ice surfaces to control the refrigeration systems call for refrigeration. These IRC's read the actual temperature of the ice surface and allow for greater efficiency. • Implement a refrigeration control system so that different schedules can be used to control differing ice temperatures such as a night set back temperature so that the ice surface is warmed up slightly overnight. • Monitor cooling tower water treatment to prevent scaling on the tube bundle which leads to reduced efficiencies. • The City may consider completing a more detailed energy analysis with a focus in achieving Zero Carbon Building Design Standards, which has been a prerequisite for recent grant applications. The analysis should provide solutions to the challenges noted in this facility.

Observations	Recommendations
• System is in very good condition and in consulting with staff, the system works efficiently.	• New and emerging heat recovery technologies to heat the pool, tennis enclosure, etc. should continue to be explored when replacing equipment through capital upgrades. Examples of heat recovery systems include 'Thermastore' tanks or 'Doucette' desuperheaters. This heat recovery can be used to heat domestic water, pool water, and ice resurfacer snow pits, etc. As part of the Energy Management study being conducted in 2024, consideration should be given to exploring full utilization of heat recovery. Advancements in the past few years has the waste heat from rinks being used to heat multi-home developments. See figure below.

Figure 10: Example of Heat Recovery Technology

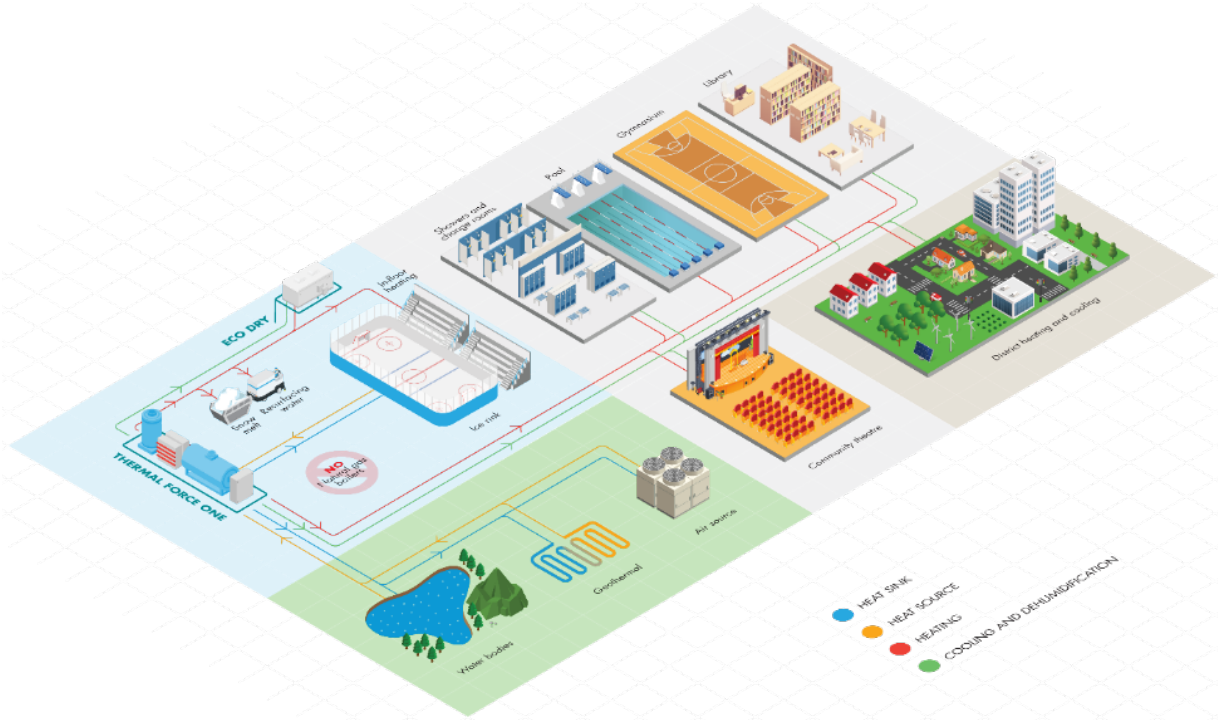

Table 10: Ice Resurfacer Room Assessment, CHDRC Arenas

Observations	Recommendations
• Both ice rinks share the ice resurfacer room. • There is a snow pit in the room but unsure of the effectiveness of snow melt ability. • Olympia ice resurfacer is used as the primary ice resurfacer while a Zamboni is used as the backup/secondary ice resurfacer. • Both ice resurfacers are currently powered by fossil fuels. • Resurfacer room is large and serves for maintenance bay for operational tasks such as blade changes etc.	• During next ice resurfacer replacement, consideration be given to switching to an electric ice resurfacer as part of green energy enhancements. • Installing a level ice system on the current ice resurfacers to assist the operator in achieving a level ice surface while maintaining a desired ice thickness to improve efficiencies both on the refrigeration plant run times and also the reduced hours for staff on ice maintenance. Both Olympia and Zamboni have level ice systems that can be retrofitted onto the current primary ice resurfacer.[10]

The following points provide a summary of **key findings and opportunities**:

1. As part of the planned Energy Management Study being conducted in 2024, consideration should be given to heat recovery and the possibility to reclaim waste heat from refrigeration plant to heat the pool and tennis court area.
2. Consider the use of electric ice resurfacers during the next replacement cycle.
3. Consider using a level ice system for the current primary ice resurfacer.
4. Consider building automation system for refrigeration plants.
5. Consider 'sub-zero' ice management tool. This tool would elevate the facilities ice management process to a higher level while also aiding the operations team in completing their regular ice depth checks.
6. This capital plan within the City's long-term capital forecast is appropriate for this facility while recognizing the age and operational changes that the facility must meet such as barrier-free accessibility requirements.

Don Beer Arena

The Don Beer Arena contains three ice pads. Short-term upgrades identified in the City's capital forecast include external door replacements, lighting, plant work (rink 3) and building envelope. The forecast also includes for the partial retrofit of rinks 1 and 3 in 2027 and 2028 (e.g., boards, roof, dehumidifier, etc.).

The City's Facilities Renewal Study (2024) finds that all three rinks are coming due for replacement of their refrigerated slabs and aprons, representing major capital costs.

[10] https://canadianrinkservices.com/level-ice

Current projections estimate that over $20 million will need to be invested at Don Beer Arena just to keep the facility in good condition over the next 10 years. The entire building has a facility condition index of 0.42 (poor condition), with an overall condition score of 3.11, ranking it as the 13th out of 23 municipal capital assets studied (with the lowest ranking facilities being candidates for disposal). Consideration may be given to whether it is practical to reinvest in this asset or better to replace its amenities at another location.

Our general observations of the Don Beer Arena are as follows:

- The arena dasher boards and glass systems are in good condition and appear to have been updated regularly.
- Upon our review, ice conditions appear to be in excellent shape with ice depths within an ideal range with no cut out of lines, etc.
- Facility operators do an excellent job with resurfacing and ice maintenance.
- In review of the 2023 operating budget, utility costs appear to be in line with this type of facility.
- The arena ceilings are very low with younger aged summer lacrosse using the facility; however, the height does not appear to be an issue.

Table 11: Facility Assessment, Don Beer Arena, Part 1

Refrigeration Room	Ice Resurfacer Rooms
• Rinks 1 & 2 share a refrigeration plant with 200 horsepower and a plate and frame heat exchanger. • The refrigeration plant is automated with a 1000 E with both slab and camera sensors. • There is no underfloor heating system due to the age of the facility. • Rink 3 has a dedicated refrigeration plant with 150 horsepower and a plate and frame heat exchanger. • The cooling tower water treatment is not performing as it should be with evidence of scaling, leading to inefficiency of the plant. • The underfloor heating system is currently not working so the City is unable to maintain summer ice operations. • Rinks 1, 2, & 3 all have desiccant dehumidification that perform well, although in the shoulder season times with higher outdoor air temperatures/precipitation, the current equipment does not have the capacity to maintain humidity levels.	• Rink 1 and 2 share a small room between the 2 rinks that has difficulty housing the ice resurfacer and is restricted to a side dump ice resurfacer. • There is no access to outside from this room. Staff dump ice shavings inside. The current process is to empty then melt with hot water. • Unable to perform ice resurfacer maintenance in this room due to being too small. • Rink 3 has a larger, more traditional size ice resurfacer room. • Has access to outdoors for dumping of ice shavings. • Serves as the maintenance bay for all ice resurfacers.

Table 12: Facility Assessment, Don Beer Arena, Part 2

Dressing Rooms	Accessibility
• Rinks 1 & 2 are very small and outdated and do not meet accessibility standards. • Older aged teams need to use 3 rooms to accommodate the number of players. • Rink 3 has 6 change rooms and are larger, however they too do not meet accessibility standards.	• Facility is deemed accessible by standards at the time but would not meet current accessibility requirements. • A significant investment would need to be made to meet current Ontario Building Code requirements.

The following points provide a summary of **key findings and opportunities**:

1. If Hydro One mandates the stormwater management implementation for the parking lot (to be completed by the City of Pickering at the City's expense), this project will add significant costs (estimated at $3 million or more) to the facility's long term capital plan. This is in addition to the approximately $100,000+ annual cost to lease the parking lot lands from Hydro One.
2. The 2023 operating budget for Building Repairs & Maintenance was identified at $213,606. This amount represents a significant operational cost annually that speaks to the challenges of maintaining an aging facility.
3. Operationally, the City may consider the following if the facility is to be maintained as an arena for several more years:
    a. Rinks 1, 2 & 3 refrigeration plant control systems (1000E) are outdated and are no longer supported or serviceable by contractors. It is recommended that these refrigeration controls systems be replaced (estimated cost $75,000 per ice plant of which there are two, including new sensors, hardware, and software with tie-in to the dehumidification unit). There may be utility conservation grants through "Save on Energy" through prescribed engineering improvements.
    b. With no underfloor heating system in Rinks 1 & 2, there is no ability to effectively run summer ice. The Rink 3 cooling tower water treatment is not performing as it should; an accumulation of scale is visible which leads to decreased heat transfer leading to additional run hours on equipment, which should be addressed. Further, the Rink 3 underfloor heating system is no longer working and is unable to maintain summer ice operations.
    c. Heat reclamation: Although the facility is aging, there is still opportunity for reclaiming waste heat from the refrigeration systems and providing building heat, offsetting the domestic hot water heating demand, or using waste heat to assist with melting snow from the ice resurfacing process. The refrigeration systems both have a generous supply of waste heat opportunity not being utilized.

d. ‘Sub-Zero’ ice management tool: This tool would elevate the facilities ice management process to a higher level while also aiding the operations team in completing their regular ice depth checks.

e. ‘Level Ice System’: This system would be mounted on the current ice resurfacers and assist the operators in achieving a level ice surface while ensuring a consistent ice thickness is maintained leading to improved operational efficiency.

f. Cooling tower scaling: It was noticed during the walk through that there was evidence of scaling within the cooling tower of the refrigeration system. We would recommend a further review of the water treatment system and ensure that the water chemistry is being maintained so that scale is being removed to eliminate build up on the hot gas coils so that improved heat transfer can be achieved leading to decreased run times on the equipment.

4. Due to lower demand levels, the City may consider having the Don Beer Arena “go dark” throughout daytime hours (Monday to Friday) to improve efficiencies, where possible. This will allow for utility savings, reduce wear and tear on an aging facility, and allow for staff to be redeployed to other areas of the operation.

The age of the original Don Beer Arena deems it has outlived an acceptable lifespan, which the Ontario Recreation Facility Association identifies at 30 to 40 years. The original Don Beer Arena is now 55 years old, although other parts of the facility are newer. To improve the facility at the current site with the extra costs associated with the parking lot lease and need for a stormwater management plan, as well as the need for accessibility improvements represents a serious financial risk for the City.

On this basis, strong consideration should be given to decommissioning the Don Beer Arena within approximately the next five years to avoid major capital expenditures. Following this, the property may be disposed of upon opening of a replacement ice facility that aligns with local needs.

This approach could be completed over a multi-year timeframe, subject to planning for capital replacement through new arena infrastructure at another location. The following steps may be considered in implementing this direction.

Table 13: Approach for Decommissioning Don Beer Arena

Phase	Recommendations
Phase 1: Limit capital spending & establish replacement strategy	• Facility remains active and an integral part of the City of Pickering ice sports programming and facility rental inventory • Begin to limit spending but maintain all operating budgets • Confirm site for a new facility build including a funding plan • Begin scaling back capital repairs and improvements other than bare minimum life safety improvements and necessary accessibility requirements • Work with Hydro One and ask for an extension on stormwater management collection
Phase 2: Facility nearing end of life	• No capital improvements unless necessary for structural or legislated safety requirements • No operating projects and only operate using a day-to-day operating expense • Construction has begun on new facility
Phase 3: Closure and transition	• Grand opening of new facility • Declare Don Beer Arena as surplus for decommissioning/retirement; consider sale as adaptive re-use to alternative uses would not rectify site issues and would require considerable reinvestment

Note: Timing / phasing will depend on arena replacement plans.

4.2 Recreational Skating Review

In addition to rentals, the City offers registered skating (e.g., learn to skate) and drop-in skating programs (e.g., public skating, shinny, etc.) at both ice facilities. Registered programs are offered during prime and non-prime times, while drop-in activities are mostly scheduled during non-prime times. For the 2023/24 season, City programs accounted for 29.5 weekly hours of use across the system (nearly 6 hours per rink).

In examining the available options, there is a very good cross section of opportunities available for all ages. In particular, the pre-registered Learn to Skate program is well attended and offers a wide selection of opportunities to all ages and skating abilities. It is understood that there is currently a waitlist for these registered programs. This is a trend seen in many other communities as some families are still trying to get “caught up” from the pandemic and learning to skate is an activity that is important for many newcomers (including both youth and adults).

Overall participation in drop-in skating programs has been in decline, decreasing by 28% since 2014. If this trend continues, it may be attributed to Pickering’s increasingly diverse population and a growing number of residents that have little interest or skills in

ice sports. Contrary to this finding, however, many residents expressed greater interest in outdoor skating opportunities through the latest Recreation & Parks – Ten Year Plan community engagements, suggesting that this is the preferred environment for this activity and/or that residents are seeking more affordable participation options as outdoor rinks are typically free to use. Outdoor rinks are not capable of accommodating organized play requirements and are not part of the assessment within this report.

Table 14: Participation in Drop-in Skating Programs (2014-23)

Drop-in Program	2014	2023	Change (#)	Change (%)
Public Skate	6,655	5,084	-1,571	-24%
Shinny	302	223	-79	-26%
Parent & Tot	723	117	-606	-84%
Senior Skate	2,243	1,733	-510	-23%
Total	**9,923**	**7,157**	**-2,766**	**-28%**

Source: City of Pickering.

To improve participation levels, accessible options for residents, and off-peak revenue enhancement, the City may wish to consider:

- increasing the number of Learn to Skate time slots to address the current backlog of demand (City programs have priority over other uses within the City's Ice Allocation Policy);
- providing additional Parent & Tot Skating and Parent & Tot Stick/Puck as these are only offered once per week;
- offering "Ticket Ice - Figure Skating" to support Skate Canada Members; and/or
- moving the shinny hockey program to the CHDRC; doing so would consolidate all recreational skating opportunities (drop in & pre-registered) at one facility.

5.0 Arena Needs Assessment

This section evaluates the overall supply of indoor ice pads in the City of Pickering based on a qualitative and quantitative analysis. The projection period is to the year 2034, however a longer-term horizon is considered where possible.

5.1 Arena Needs

In identifying current and future ice facility needs, several inputs have been considered. Ice demand is heavily influenced by local participation and programming. Registration data, arena usage, and input from stakeholders are the key building blocks to our analysis. Community growth projections are then layered in to forecast future needs. These inputs are documented in previous sections.

Figure 11: Factors considered in the Ice Needs Assessment

Population Factors (Section 2.5)	Arena Utilization (Sections 2.1, 2.2, and 2.4)	Participation & Trends (Sections 2.5 and 5.1)	Public & Stakeholder Input (Section 3)
• Population Characteristics, such as age and immigration • Growth Forecasts	• Ice Utilization • Limitations of City Facilities • Availability of Other Arenas in the Vicinity	• General Trends in Recreation • Ice Sport Registration Levels in Pickering	• Challenges and Opportunities • Requests for Additional Ice Time

Current Demand

All indicators suggest that there is capacity within the current arena supply to accommodate more users. For example:

- Prime-time usage sits around 92% (87% at Don Beer Arena), leaving approximately 25 hours of prime time ice available for use on a weekly basis – **this is equivalent to nearly 0.5 ice pads of excess supply**. Demand is particularly soft on Saturday evenings.
- User groups are not requesting additional time and are not pressured to use shoulder or non-prime hours (e.g., weekday mornings). They appear to be getting as much ice time as they need to run their programs either locally or in Ajax.
- In Pickering, youth participation in ice sports declined by 8% (203 participants) between the 2014/15 and 2023/24 seasons, after several years of additional declines – across Ontario, youth participation in ice sports peaked in 2012/13. Participation has not increased with recent population growth, suggesting that the participation rate in ice sports continues to slowly decline.

- Of the 2,225 estimated youth ice sport participants making regular use of the City's arenas, it estimated that approximately 42% (925) are residents of Pickering. This accounts for 5% of all youth (ages 5 to 19) living in Pickering, meaning that 1 out of 20 youth play organized ice sports locally. This is notably lower than participation rates that we have seen in other communities where we have conducted similar analysis, and likely in the range of half of the provincial average. While trends in ice sports do not suggest rising participation rates, the 5% rate is a reasonable figure to use for projecting participation over the next ten years. Participation levels should be collected by the City to ensure that this assumption remains valid.
- The Town of Ajax has also been seeing reduced demand for ice time for several years, leading them to reduce their supply from 5 ice pads to 4 ice pads through the closure of Village Arena. The Town indicates that there remains capacity for additional use during prime time hours (roughly calculated at 0.6 ice pads of excess supply). Ice permits are guided by an ice allocation policy that is similar in nature to the one employed by the City of Pickering.
- Pickering is currently providing ice pads at a similar rate to other area municipalities but a higher rate than more urbanized municipalities, which the City is transitioning into. As Pickering grows beyond 2034, the rate at which it provides ice pads could potentially decline in response to efficiencies, regional supplies, and participation trends. While many larger municipalities are planning to expand their arena supply to address growth pressures, they are doing so at a significantly lower rate.

On the basis of these findings, it would appear that the City has some degree of surplus ice at this time and is under no immediate pressure to expand its supply in the short-term. An examination of current usage levels suggests that – with increased coordination of ice rentals with the Town of Ajax to ensure sufficient allocation of time to core minor groups – the City could consider reducing its supply to 4 ice pads.

Estimating Future Participation

As noted, any projection of local ice demand must consider jointly the needs of the City of Pickering and the Town of Ajax as the primary arena user groups offer service to residents of both municipalities (aside from figure skating). Presently, there are 9 ice pads (5 in Pickering and 4 in Ajax) serving approximately 2,682 youth registrants (see Figure 5 in Section 2.3) – including residents of Pickering, Ajax, and beyond – for a current average of 298 players per rink.

The projected number of ice participants can be calculated by applying overall participation rates to the forecasted population of the identified age groups. By applying the age cohort assumptions established for Durham Region to the City of Pickering's population forecast, it is estimated that the City's population aged 5 to 19 years will grow at a rate of approximately 50% over the next ten years, slightly higher than the City's projected growth rate of 45%. If the youth ice sport participation remains steady at 5% for the ten-year projection period, this suggests that arena registration amongst

Pickering residents will also grow by 50%, an increase of 460 players by 2034. Both the projected youth population and participation rate are lower than estimates from previous plans, which will have a dampening effect on future arena requirements.

Arena demand generated from those living outside of Pickering (but served by local or regional groups) must also be considered. It is noted that Pickering's population is expected to grow more than twice as fast as Ajax's, thus Pickering's share of youth participants is likely to increase at a greater rate over time that than of Ajax. A youth growth a rate of 20% over the next ten years has been applied to estimate the number of future youth ice users from municipalities beyond Pickering.

The following table illustrates an updated forecast of youth registration levels in Pickering (and more broadly for West Durham minor sports groups) to the year 2034.

Table 15: Projection of Registered Youth Ice Sport Participants, City of Pickering and Town of Ajax (present to 2034)

Category	Current (2023/24)	Forecast (2034)	Change (2024 to 2034)	Change (2024 to 2034)
City of Pickering Population, ages 5 to 19 years (estimated 50% growth rate)	18,400	27,650	9,250	50%
Youth Registrants – City of Pickering residents only (5% local participation rate)	925	1,385	460	50%
Youth Registrants – Outside Pickering (Ajax, etc.) (estimated 20% growth rate)	1,757	2,108	351	20%
Youth Registrants – Total	**2,682**	**3,493**	**811**	**30%**

Population sources include Region of Durham, Region-Wide Growth Analysis Technical Report (June 2021), Envision Durham Official Plan (2023), and City of Pickering. Detailed 20 Year Population Forecast (March 2023). Where necessary, population forecasts have been interpolated to match the projection period.

With consideration of demographic forecasts and participation rates, it is projected that the number of youth ice sport participants registered within affiliated local organizations will increase by 30% over the next ten years. This represents growth of 811 participants, from 2,682 in the 2023/34 season to approximately 3,493 registrants in 2034.

Changes in the population forecasts along with unforeseen factors influencing ice sport participation rates are two notable factors that could impact estimated future ice demand. The absence of age-cohort population forecasts for Pickering has led to the use of several assumptions in the projection model. Any substantial increase or decrease in the child and youth population or the rate at which they participate in organized ice sports could impact the analysis of arena needs. The City is encouraged to closely monitor this data and potential impacts on the needs assessment over the coming years.

Establishing a Target for Future Provision

Use of a participant-based service target for forecasting arena demands is preferred over a population-based target as it is better able to reflect local participation levels and trends and is more strongly aligned with standards of play. Using registration data from local user groups, market-driven targets can also assist municipalities in tracking demand over time.

Through updated research and consultation with stakeholders, a **youth-based provision target** is recommended moving forward as prime time ice needs for youth organizations – the primary user of municipal arenas – have become more apparent. This approach better reflects how the City allocates ice time and ensures that youth have reasonable access to ice time outside of school hours. Adult ice usage also tends to be more volatile as they require less ice time per participant and are generally more flexible in when and where they rent ice time. A service target of one ice pad per 400 to 500 minor participants is typically used to project future needs in comparable mid-sized municipalities.

For planning purposes, an appropriate provision target for the City of Pickering is **one ice pad per 400 youth participants**. This target must also be applied to arenas in the Town of Ajax as both Pickering and Ajax arenas generally serve the same registrants. For the 2023/24 season, there is an average of 298 youth participants using the nine ice pads operated by the City of Pickering and Town of Ajax.

The provision target of 1 ice pad per 400 registered youth assumes that youth will continue to use the large majority of prime time hours and that, over the long-term, the intent is to accommodate the needs of all local groups and their residents within Pickering and/or Ajax. The target is intended to represent a reasonable supply-demand equilibrium that recognizes the high cost of building and operating areas and balances this against the expectation that most user groups will have to accept some hours at the edges of prime-time and/or adjust their programs to maximize the use of available ice time. It is also set at a level that will allow for modest growth in City programming during prime times, as well as occasional tournaments, and adult usage during shoulder hours.

Projecting Current and Future Needs

The following table illustrates application of the preferred provision target, assuming the estimated participation rate (5% of Pickering youth) and that the youth market segment changes at the forecasted rate.

Based on a current supply of 9 ice pads, this analysis identifies a surplus of 2.3 ice pads at present between both Pickering and Ajax, declining to a modest surplus of 0.3 ice pads by 2034.

Table 16: Projection of Ice Pad Needs, City of Pickering and Town of Ajax to 2034

Category	Current (2023/24)	Forecast (2034)
Youth Registrants – Total (Pickering, Ajax, etc.)	**2,682**	**3,493**
Number of Ice Pads Required (based on 9 pads at present and a provision target of 1 ice pad per 400 youth registrants)	6.7 pads	8.7 pads
Additional Ice Pads Required (Pickering & Ajax)	surplus of 2.3 pads	surplus of 0.3 pads

Although beyond the projection period of this strategy – based on the stated assumptions and forecasts – the long-term (2042) projection is estimated to be in the range of 10 to 11 ice pads, which would be 1 to 2 ice pads more than are currently available between Pickering and Ajax.

The current calculated surplus of 2.3 ice pads is greater than that stated on municipal ice schedules, which show that there is the equivalent of about 1.1 ice pad of unused prime time at present between the City of Pickering and Town of Ajax, some groups are likely receiving additional time over and above typical standards of play. In a scenario where supply and demand are in equilibrium, these groups would be expected to modify their programming to align with standards of play, which should enable them to continue to meet their targeted level of service.

It should be noted that, although this exercise includes a forecast of arena needs for the Town of Ajax, endorsement of this calculation has not been sought from this municipality. This regional projection of arena demand is not binding on the Town of Ajax and assumptions are required as to the degree to which these arena needs will be met by the Town in the future, if any. Reference should be made to the Town of Ajax's approved Recreation and Parks Master Plan which identifies arena needs to the year 2031.

Allocating Needs Between Municipalities

Currently, the City of Pickering supplies 5 indoor arena pads and Town of Ajax operates 4 pads.

For the purposes of this Arena Strategy, it is assumed that arena needs will be shared equally (50/50) by both Pickering and Ajax as these two municipalities are projected to have similar total populations by the year 2034. Based on this assumption, the City's localized demand is currently for 3.4 ice pads (1.6 pads surplus), growing to a need for 4.4 ice pads by 2034.

Table 17: Allocation of Ice Pad Needs, City of Pickering and Town of Ajax to 2034

Category	Current (2023/24)	Forecast (2034)
Total Number of Ice Pads Required	6.7 pads	8.7 pads
City of Pickering – 50% of requirement	3.4 pads	4.4 pads
City of Pickering – less existing supply (5 pads)	surplus of 1.6 pads	surplus of 0.6 pads
Town of Ajax – 50% of requirement	3.4 pads	4.4 pads
Town of Ajax – less existing supply (4 pads)	surplus of 0.6 pads	deficit of 0.4 pads

If these assumptions and growth rates remain accurate, a longer-term projection to the year 2042 results in a local need for roughly 5 to 6 ice pads in Pickering.

5.2 Considerations for a Multi-Purpose Event Arena

As Pickering grows, there may be greater interest in larger capacity facilities that can support the City's economic and tourism goals, in addition to community-based recreation needs and/or goals for supporting high-performance athletics. The service delivery model articulated in the 2017 Recreation and Parks Master Plan supports a broad range of opportunities for residents of all ages and abilities, with a focus on community-based programming. This model does not explicitly include or exclude projects with expanded economic or tourism benefits, but does emphasize the importance of special events in the community.

A multi-purpose/spectator event arena is not necessary to satisfy community recreation needs. City of Pickering programming and events, as well as the programs offered by local ice sport organizations, are capably accommodated within current facilities, notwithstanding the potential for one-off events or provincial/national level events. Currently, the highest level of play in Pickering – and thus the likeliest to draw the most spectators on a regular basis – is the Junior A Panthers Hockey Club, which typically draws less than 200 spectators per game. Tournaments and events can draw more attendees, but are generally able to be accommodated by the 850 seats in the Delaney Rink.

Based on our knowledge of multi-use event venues in Ontario (such as facilities that host Ontario Hockey League teams, typically with 4,000+ seats), most of these facilities are rarely used for community recreation (e.g., municipal programming, minor sports, etc.) due to their lack of consistent availability during prime time and are not typically included in the calculation of local facility requirements. Municipal arenas commonly provide 200 to 1,200 seats to meet community-level needs, a range that is largely provided for in Pickering at the CHDRC.

The size of the market and ability to attract hundreds of events year over year are key considerations to creating a viable business plan for a multi-use event venue that can, at minimum, break even operationally. The nearest large indoor spectator venues to Pickering include the Pickering Casino in Pickering ("The Arena", a 2,500-capacity entertainment venue with retractable seats) and Tribute Communities Centre in Oshawa (home of the Oshawa Generals and a capacity of up to 7,300 persons). There are also several large-capacity venues closer to downtown Toronto with ready-access to the GO Train.

The initial capital outlay for these facilities is sometimes justified based on the argument of indirect benefits to the community, such as economic spin-offs, increased tax assessments from nearby landowners, job creation, enhanced civic marketability, tourism, etc. Increasingly, many of these facilities are supported by public-private partnerships that leverage private funding. The return on investment is defined differently in these scenarios, compared to community-based recreation facilities that are supported on the basis of greater social cohesion, individual health, and community wellbeing.

A detailed viability assessment is beyond the scope of this study, but with many spectator and event facilities already available in the Greater Toronto Area, it is possible that the inventory is saturated. A more detailed evaluation is recommended should there be interest in further evaluating the viability of a multi-use spectator event centre to support both ice activities and other high-profile events in Pickering (e.g., stadium-style arena with seating for 3,000+ spectators). The City may also wish to consider the ability to modify one of the rinks at the CHDRC to meet expanded needs.

The following items may be considered to identify options and viability of a multi-use event venue in Pickering:

1. **Situational Assessment:**
    - Alignment with corporate objectives, financial capabilities, etc.
    - Gap analysis and identification of potential uses, tenants, events, etc.
    - Market demand analysis (consideration of other facilities within market-shed)
    - Case study analysis (best practices from comparable facilities and models)

2. **Opportunities:**
    - Location assessment (site, servicing, parking, transit, adjacencies, etc.)
    - Impact on existing municipal facilities
    - Partnership analysis (including private sector contributions)
    - Economic impact analysis / risk assessment
3. **Costing and Implementation:**
    - Conceptual design (building features, seat count, etc.)
    - Cost estimation (capital and operating)
    - Governance and management structure
    - Funding strategy

5.3 Arena Provision Options

The analysis above supports the provision of up to 4 indoor ice pads in Pickering to meet current community needs (1 less than are currently provided), with demand for a fifth ice pad anticipated closer to 2034. There is sufficient capacity to accommodate all affiliated minor sports organizations within prime time through a coordinated effort involving both Pickering and Ajax. This assessment is based on the Town of Ajax providing equal access to cross-jurisdictional minor sport organizations and no private arenas being established in the region.[11]

Note: Although the City may pursue the development of refrigerated outdoor skating rinks in the future, outdoor pads are intended for leisure skating uses and are not able to satisfy the requirements for organized play. On this basis, outdoor rinks are not considered within this report.

Options

Based on the analysis in this report, two options for meeting community-based arena needs over the next ten years have emerged (numbered for ease of reference):

Option 1: Reinvest in Don Beer Arena

Under this option, the CHDRC and at least two pads at the Don Beer Arena would be maintained for at least the next ten years, with the goal of keeping them operational much longer. This option will require continued investment in both facilities, most notably Don Beer Arena which has immediate and significant capital requirements despite being underutilized. To right-size supply with

[11] The Town of Ajax, which recently closed the Village Arena due to low demand (single pad) has a recommendation in its 2022 Recreation & Parks Master Plan to consider the addition of a twin pad arena to the Audley Recreation Centre (Phase 3 expansion) subject to demonstrated community need. This project is not currently within the Town's 2024 to 2033 long-range capital forecast and it is currently not known if and when it will proceed. The Town of Whitby's decision to add another ice pad to its inventory may also provide some additional capacity for the Central Durham area.

demand, closure of one ice pad could be considered (likely Rink 1 as this is the oldest ice pad, has the smallest change rooms, and needs capital repair), which would limit both capital and operating expenses and offer the potential to use the floor for non-ice activities. Note: City of Pickering staff do not recommended proceeding with closure of any ice pads.

Option 2: Replace Don Beer Arena with a new Twin Pad

Two (2) arena pads may be built within approximately the next five years (by 2029), coupled with the closure and decommissioning of Don Beer Arena. With Seaton being the continued focus of new residential development in Pickering, consideration may be given to building a new twin pad facility in this area (e.g., Seaton Recreation Complex & Library site). Ideally, the new facility should be built with the ability to expand to four ice surfaces if the need arises. Alternately, an additional site may be required to accommodate a multi-pad arena to meet longer-term needs (this would the subject of further study). Timing of this option will need to be optimized so that significant renewal costs are avoided at Don Beer Arena and that the opening of the new facility coincides with the closure of Don Beer Arena to ice activities.

Each option has a different scale of cost and service implications, which need to be considered in relation to how capital reinvestment addresses community needs in the short, medium, and longer-terms. This analysis, combined with the information and findings from previous sections of this Arena Strategy, is intended to inform Council's decision regarding future arena investment in Pickering.

The following table contains a summary of the key attributes of each option.

Table 18: Key Attributes of the Proposed Arena Provision Options to satisfy needs to 2034

Category	OPTION 1: Reinvest in Don Beer Arena	OPTION 2: Replace Don Beer Arena with a Twin Pad
Service Level	• 5 ice pads at 2 locations • Average age of construction = 1982 (currently 42 years old) • Don Beer Arena would remain in inventory	• 4 ice pads at 2 locations • Average age of construction = ~2004 (approx. 20 years old) • Don Beer Arena would be considered surplus and potentially sold (revenue offset)
Demand & Usage	• Location of Don Beer Arena would remain an impediment to optimal use • Removal of ice from 5th ice pad could be considered to realize cost efficiencies and potential use for non-ice activities	• Greater potential for year-round use • New ice pads would be located closer to growth areas and younger families, increasing usage potential

Category	OPTION 1: Reinvest in Don Beer Arena	OPTION 2: Replace Don Beer Arena with a Twin Pad
Operational Considerations	• Long-term lease of parking lot from Hydro One is essential to operation at Don Beer Arena (increasing annual cost) • Resolution needed to stormwater management mitigation at Don Beer Arena (estimated cost of $3+ million) • Unable to fully resolve several operational challenges (e.g., ice plant/resurfacer room, energy use, etc.)	• Purpose-built design that meets client requirements • Opportunity to include modern technologies within new ice pads (energy efficient) • New arenas could be co-located with other recreational amenities, creating economies of scale • Lower initial maintenance costs
Capital Costs	• Don Beer Arena: estimate of $20 million (next 10 years) in deferred maintenance • Don Beer Arena has exceeded its functional lifespan and will require significantly more investment beyond this 10-year time period • CHDRC: approximately $10.5 million (next 10 years)	• $60 to $87 million (new twin pad), with lower capital renewal costs in short-term • Replacement facilities may need to draw on reserves/financing as not be eligible for growth-related funding • CHDRC: approximately $10.5 million (next 10 years)
Accessibility & Design	• Barrier-free accessibility issues at Don Beer Arena are unlikely to be fully resolved • No ice pads within the current inventory are NHL standard size • Change rooms at Don Beer are under-sized and do not meet public expectations	• 2 new ice pads would have fully-accessible support spaces • If possible, the site and building should be designed to add 2 additional rinks (to form a quad pad) through a future phase of construction • Ice pads would be designed to NHL-standards • Change rooms and support spaces would be designed to contemporary standards

Location Considerations

In seeking a location for a new arena facility, it would not be prudent or cost-effective to expand any of the City's current arena facilities to address future needs – both sites are fully subscribed and additional arenas would not be the highest priority for either site. Furthermore, the construction of a single pad arena is strongly discouraged due to financial, operational, and functional inefficiencies relative to multi-pad designs. Any future needs should be accommodated through twin or quad pad facilities.

Consideration should also be given to the communities served by these facilities.

- **CHDRC** is conveniently located in the City Centre, offering good access to most residents living within established areas of Pickering, as well as future residents within the growing City Centre and Kingston Road areas. This location also offers excellent access to Highway 401 for regional users and tournaments. With two ice pads at present, it is not a candidate for expansion but is ideally suited to meet needs in South Pickering.
- The **Don Beer Arena** is located south of Highway 401 and east of Frenchman's Bay, in a light industrial and commercial area without ready access to public transit. The immediate area has no nearby residential communities and is only 1.5 kilometres away from the CHDRC as the crow flies (about 3.5-kilomtres if driving). As noted throughout this report, the location of this facility compromises its ability to serve as a community designation and its eventual closure should be carefully considered.
- The **Seaton area** is Pickering's emerging residential community and currently lacks any indoor recreation facilities. The planned Seaton Recreation Complex & Library (in the area of Whitevale Road and Sideline 24) will be entering its design phase in 2024 and construction commencing in 2026. There is also a second recreationally designated site that could potentially house an arena, although it is not likely to be ready for development during the desired timeframe. By 2042, Seaton is projected to have 41,200 persons, growing to a build-out population of 70,000. Additionally, there are nearby areas such as Duffin Heights that could also benefit from such an arena in the vicinity. Arenas would be a good fit for this community as it continues to grow, including many young families.
- Longer-term, the new community in **Northeast Pickering** may also be a candidate for arena provision. While a secondary plan for this area is just getting underway, residential development is many years away, which does not align with the timeframes being recommended for the Don Beer Arena replacement.

Capital Costs

In terms of capital cost, through its examination of other major capital projects, the City has noted the dramatic rise of construction costs in recent years. At a high level, **a twin pad arena expansion** can be estimated to be up to 90,000 square feet in size (depending on the degree to which other common spaces are included in the base community centre build). Based on recent tendered prices of $675 to $775 per square foot, this equates to a minimum construction cost of $60 million. An additional 25% may be added for design and contingency fees.

There are several factors that could lead to cost increases beyond this figure, including phased construction, challenging sites (e.g., soil stabilization or remediation), co-located amenities, environmental objectives (e.g., geothermal heating, net zero energy, zero carbon, etc.), the need for additional spectator seating or parking, specialized finishings, and more.

To inform future analysis, general design considerations for new arenas are identified below and **Appendix A** contains a typical arena facility program. These are to be confirmed through detailed design and in consultation with stakeholders.

General

- Follow the City of Pickering's Accessibility Plan to design facilities above and beyond the minimum standards of the Ontario Building Code and continue to demonstrate leadership with facilities and services that are inclusive to all.
- Arenas are one of the highest energy costs for a municipality. The Pickering Integrated Sustainable Design Standards, Version August 2022, does not specifically address energy and emission limits for recreation or arena facilities. As a supplement to this standard, the Canada Green Building Council's Zero Carbon Building Standard for Design and Performance can provide guidance and specific building performance metrics that will help the City respond to the Climate Emergency by reducing green house gas emissions and developing resilient public infrastructure for its communities.

Site

- Develop the site to strengthen or develop multimodal access to the facility to promote active lifestyles, reduce car and minimize parking requirements.
- Arena parking lots are often designed to accommodate the facility's largest events, leaving large expanses of pavement empty the majority of the time. Consider parking lot configurations that allow partitioning the lot into different zones which can support outdoor activities. For example, court sports have potential to activate these areas, increasing the useability of the site.
- Maximize opportunities to develop outdoor amenities that include both active and passive enjoyment. Outdoor spaces that are integrated with adjacent indoor areas expands program possibilities and enhances the quality of the facility with direct access to nature and views.

Arena Facility

- Arenas can bring the community together for more reasons than sport or practice. Including room for socializing in spaces that are part of the lobby and in the middle of the action, rather than removed, often on the second floor above the change rooms, helps build community spirit.
- Consider each space of the facility in terms of daily and year-round use early, to ensure maximum flexibility and spatial efficiency is integrated into the design from the beginning when changes do not cost much. For example, space requirements for smaller program like skate rentals, or storing rink dividers and ice rink covers to big program like spectator seating, can significantly affect the overall organization of the building.

- Team rooms in older facilities often limit who can use the ice rink comfortably. Private showers and washrooms with enough space for those with assistive devices to maneuver can make a big difference.
- Refrigeration systems that use natural refrigerants should be specified to future proof the system from HFC phase down under the Kigali Agreement, an amendment to the Montreal Protocol. Safety standards and CSA requirements for operation should also be part of this discussion.
- There are many systems that can help reduce the environmental impact of an arena while improving the overall comfort of the facility, including high performance building envelope, heat recovery for spectators, electric ice re-surfacers for improved indoor air quality and high efficiency air and humidity control, to name a few. All possible measures should be reviewed by operational staff to determine best long-term solutions.

6.0 Recommendations

Based on the preceding analysis, this study makes the following recommendations:

1. Update the participant-based target to **1 ice pad per 400 registered youth participants** (residents ages 5 to 19) to support current and future ice surface needs. This target applies to the arena supply and user base of arenas in both Pickering and Ajax, which must be considered together due to the cross-municipal boundaries of core user groups.

2. Align arena demand to supply based on a need for **4 indoor ice pads currently and 5 total ice pads by 2034**. There is a surplus of ice at present; however, demand for ice sports will grow along with the population, gradually eroding this surplus. Should programs be formed that attract new users to ice sports (or if total registration changes in any substantial way), this forecast should be revisited. Pickering and Ajax should share equally in addressing these demands.

3. **Begin planning to replace Don Beer Arena with two (2) new ice pads within the Seaton community no later than 2029 (next five years).** The preferred site is the Seaton Recreation Complex & Library. If the selected site cannot be expanded to a quad pad arena through a future phase of construction, a second site may be required for a multi-pad arena beyond 2034, possibly in Northeast Pickering.

4. **Maintain at least 2 ice pads at Don Beer Arena until such time as the new twin pad facility is open.** In the interim, reduce capital spending at Don Beer Arena unless necessary for structural or legislated safety requirements. Once deemed surplus, dispose of Don Beer Arena property and use proceeds to offset funding of replacement infrastructure. Consideration may also be given to removing ice from Rink 1 to limit capital and operating expenses (non-ice activities may be permitted, as appropriate) and/or limiting off-peak hours of operation. **Note: Although this recommendation may result in operational and economic efficiencies, City of Pickering staff do not recommend removing any ice pads from the inventory at this time.**

5. **Continue to operate two ice pads at the Chestnut Hill Developments Recreation Complex for the foreseeable future.** Capital requirements are identified in the City's long-term forecast, with further technical considerations within Section 4.1 of the Arena Strategy.

6. Continue to promote **recreational skating and drop-in programs** at the CHDRC and consider providing additional opportunities (e.g., Parent & Tot Skating, Parent & Tot Stick/Puck, Ticket Ice, etc.) to improve participation levels, accessible options for residents, and off-peak revenue enhancement. Expand programming to the new arena when built.

7. Consider adjustments to the City's **Ice Allocation Policy and practices** to ensure that they reflect local demand, provide adequate ice time to priority categories, and generate efficiencies. The submission of annual registration figures (including residency) by user groups should be strictly enforced as a condition of approval. Further, the City is strongly encouraged to work with the Town of Ajax to ensure that allocation practices and amounts are consistently applied across both jurisdictions to create a fair and transparent approach to allocation. Should demand for ice rentals grow over time, ice sport organizations should be encouraged to make efficient use of non-prime time hours and to adapt their programs to accommodate all participants, such as adjustments to practices, rosters, and scheduling.

8. Through future Recreation & Parks Plan updates, consider **longer-term arenas needs (post-2034)**, with a focus on growth areas such as Northeast Pickering as well as a capital replacement strategy for the Chestnut Hill Developments Recreation Complex arenas. It will be important for the City to secure sufficient blocks of land to support major recreation infrastructure within the **Northeast Pickering** community.

Appendix A: Typical Arena Facility Program

Note: The following program is considered a starting point for new arena design and construction on an undefined site. All figures are preliminary and should be confirmed through detailed design and in consultation with stakeholders.

Table 19: Typical Arena Facility Program

Program – Floor Area Breakdown	Square Feet (sf)
Lobby / Entrance	--
Public Area (includes area for warm viewing)	5,382
Reception	54
Admin	431
Washrooms - Universal	1,076
Elevator	97
Snack Bar	269
Vending	161
Skate Shop and Rentals	431
Arena	--
Rink - NHL Size - 200 ft x 85 ft (includes apron, team, scorekeeper and penalty boxes)	23,142
Spectator Area 200 Seats	2,691
Spectator Area 500 Seats	5,920
Walking Track	7,535
Dressing Room (6 per sheet minimum / 8 preferred)	592
Showers and Washrooms (Private cubicles)	431
Referee Room	334
First Aid	161
Warm-up Area	484
Media Box	538
Sound Lighting Controls	129
Meeting Room	538
Storage	2,153
Janitor Rooms	269
Equipment Room (all mechanical and electrical services, resurfacer garage, storage, snow melt pit, workshop)	8,611
Gross-up Area	Add 25%