

## Background

The Community Services Committee received a report entitled “Indoor Turf and Multi-Purpose Facilities” at the meeting of April 3, 2017. The report summarized inquiries and unsolicited proposals received by the City with regards to indoor turf and multi-purpose facilities. The report recommended retaining Monteith Brown Planning Consultants (MBPC) to confirm demand for these types of facilities and develop a framework to receive and evaluate proposals for the development of recreation facilities that require City support.

Additionally, as part of 2016 Budget deliberations, Council requested a report to Community Services regarding a double or triple ice pad in Valley East, include a benefit and budget analysis.

The following report provides the necessary background information required in order to develop a framework to receive and evaluate proposals related to indoor turf, multi-purpose and other recreation facilities.

### Multi-Use Recreation Complex Feasibility Study

The City’s Multi-use Recreation Complex Feasibility Study recommended a broad target of one indoor turf field per 100,000 residents based on a municipal comparator scan at that time. This target suggested a requirement of two indoor turf fields (200 by 100 feet) to meet the needs of a variety of field sports and indoor events.

### Arena Renewal Strategy (2013)

The Arena Renewal Strategy report contained an extensive analysis of the City of Greater Sudbury’s arena facilities including:

- A summary of the recent life cycle analysis
- Cost recovery data
- Demand and ice usage for City facilities
- General demographic data regarding population and trends in ice usage
- A summary of the community consultations
- Other considerations and some replacement vs. repair scenarios

The findings of the analysis generally suggested that Greater Sudbury will experience little or no growth in the number of ice users, based on current trends. The City’s 16 ice pads, based on the geography of Greater Sudbury, were deemed a reasonable inventory to meet current demand. The report noted that as the population ages, there may be a need to decrease the inventory, unless alternate programming is introduced. Information regarding specific facilities suggested that arenas in the farthest reaches of Greater Sudbury are used the least.

The following is a summary of key findings from the trends analysis and arena needs assessment conducted as part of the Arena Renewal Strategy:

Aging Arena Infrastructure: Many of Greater Sudbury’s arenas were found to be approaching or beyond their functional life cycle, based on industry standards.

Declining Number of Youth: Based on the further contraction of the youth population forecasted over the next ten years, declining registrations in arena activities can be expected barring any increase in participation rates.

Aging Population: The report suggested that the City's aging population could generate modest requests for additional ice during prime and non-prime times, however, this was unlikely to have any real impact on overall rental demand.

Decreasing Participation in Organized Arena Activities: In line with provincial and regional trends, Greater Sudbury is experiencing decreasing participation in organized ice sports. Recent increases in female hockey participation has helped to reduce this impact, however, trends suggest that these rates have plateaued.

Latent Demand Unrealized: Any latent demand that was anticipated prior to constructing the City's sixteenth rink (Countryside #2) had not been realized. This suggested that Countryside #2 was attracting usage away from the City's more remote arenas rather than accommodating "new" utilization.

Softening Demand: The City's arenas were found to be well utilized during prime hours, however, booking data demonstrated a softening of demand during shoulder times (10 p.m. to 12 a.m. throughout the week).

Decentralized Operations: With the twinning of the Gerry McCrory Countryside Complex, Greater Sudbury began to move in line with other communities that are concentrating multiple ice pads within one facility.

Surplus of Ice: It was anticipated that the City will have a surplus of one ice pad beginning in the 2013/14 season. This surplus is expected to persist, such that there will continue to be sufficient demand to support a City-wide supply of 15 ice pads for the foreseeable future.

## **Parks Open Space & Leisure Master Plan Review (2014)**

### Indoor Turf Facilities

The Parks, Open Space & Leisure Master Plan Review (2014) notes that due to the popularity of soccer expanding into all seasons, there is a requirement for artificial turf indoor facilities. The Multi-use Recreation Complex feasibility study completed in 2007 identified demand for two indoor turf fields (200' by 100'), based on a broad target of one indoor turf field per 100,000 residents.

The Leisure Master Plan states that the financial viability of an indoor turf facility is heavily influenced by its size, type of construction, and operating model. The document indicates that many municipalities have chosen to forgo providing indoor field facilities, instead deciding to allow the private sector to fill this void.

### Multi Purpose Facilities

One of the principles of the Parks, Open Space and Leisure Master Plan is that multi-purpose leisure facilities are preferred over single purpose facilities, noting that they may not be appropriate for all communities.

The benefit of multi-pad arenas was also reaffirmed in the Leisure Master Plan. It suggests that any future arena construction should give strong consideration to the benefits of multi-pad designs where supported by demand.

### **CGS Arenas Building Condition Assessment Summary**

Building Condition Assessments were completed on municipal arenas in 2012. The BCA's provided an overall condition assessment for each arena, as well as opinions of probable repair costs required in the immediate term (1 to 5 years) and long term (6 to 10 years). A total of \$24,164,000 in capital repairs were called for over a 10 year period for CGS arenas. The following is a summary of the 2012 Building Condition Assessments:

<b>Facility</b>	<b>Construction Date</b>	<b>Building Condition</b>	<b>2013-2017 1 to 5 years</b>	<b>2018-2022 6 to 10 years</b>	<b>Total</b>
Sudbury	1951	Marginally Fair Condition	\$2,375,000	\$1,450,000	\$3,825,000
Capreol	1960 (#1) 1974 (#2)	Fair Condition	\$2,015,000	\$1,037,000	\$3,052,000
Chelmsford	1970	Marginally Fair Condition	\$1,760,000	\$1,057,000	\$2,817,000
Dr. Edgar Leclair	1968	Fair Condition	\$751,000	\$1,173,000	\$1,924,000
Carmichael	1972	Fair Condition	\$921,000	\$756,000	\$1,677,000
Cambrian	1972	Fair Condition	\$895,000	\$687,000	\$1,582,000
Centennial	1972	Fair Condition	\$637,000	\$911,000	\$1,548,000
IJ Coady	1976	Fair Condition	\$682,000	\$795,000	\$1,477,000
Raymond Plourde	1974	Fair Condition	\$764,000	\$602,000	\$1,366,000
TM Davies	1974	Fair Condition	\$563,000	\$737,000	\$1,300,000
Toe Blake	1970	Fair Condition	\$785,000	\$382,000	\$1,167,000
McClelland	1977	Good Condition	\$533,000	\$602,000	\$1,135,000
Garson	1972	Fair Condition	\$420,000	\$462,000	\$882,000
GM Countryside	1993 (#1) 2011 (#2)	Good Condition	\$137,000	\$275,000	\$412,000
<b>Sub Total</b>			<b>\$13,238,000</b>	<b>\$10,926,000</b>	<b>\$24,164,000</b>

The following summarizes capital repairs completed and/or budgeted since Building Condition Assessments were completed in 2012:

Facility	Description of Major Capital Work	Amount
Sudbury	<ul style="list-style-type: none"> <li>•Lighting retrofits</li> <li>•Dehumidification equipment</li> <li>•Platform upgrades</li> <li>•Shoring and stairwell repair</li> </ul>	\$890,033
Capreol	<ul style="list-style-type: none"> <li>•Building shell repairs</li> <li>•HVAC and dehumidification</li> <li>•Condenser replacement</li> <li>•Asbestos abatement</li> <li>•Lighting retrofits</li> <li>•Sports flooring</li> </ul>	\$427,044
Dr. Edgar Leclair	<ul style="list-style-type: none"> <li>•Interior renovations</li> <li>•Compressor replacement</li> <li>•Lighting retrofits</li> <li>•Sports Flooring</li> </ul>	\$182,504
Chelmsford	<ul style="list-style-type: none"> <li>•Arena refurbishment</li> <li>•HVAC equipment</li> <li>•Plant equipment</li> <li>•Gutter installation</li> </ul>	\$2,703,679
Toe Blake	<ul style="list-style-type: none"> <li>•Plant equipment</li> <li>•Sports flooring</li> </ul>	\$53,229
Cambrian	<ul style="list-style-type: none"> <li>•Compressor replacement</li> <li>•Roof replacement</li> <li>•Sports flooring</li> </ul>	\$221,367
Carmichael	<ul style="list-style-type: none"> <li>•Roof replacement</li> <li>•Lighting retrofits</li> <li>•Condenser replacement</li> <li>•Lighting upgrades</li> </ul>	\$479,915
Centennial	<ul style="list-style-type: none"> <li>•Lighting upgrades</li> <li>•HVAC equipment</li> <li>•Sports flooring</li> </ul>	\$84,866
Garson	<ul style="list-style-type: none"> <li>•Replace low-e ceiling</li> <li>•Lighting retrofit</li> <li>•Interior renovations</li> </ul>	\$143,576
TM Davies	<ul style="list-style-type: none"> <li>•Building shell</li> <li>•Lighting retrofit</li> </ul>	\$208,974
Raymond Plourde	<ul style="list-style-type: none"> <li>•Asbestos abatement</li> <li>•Interior renovations</li> <li>•Lighting retrofit</li> <li>•Condenser replacement</li> <li>•Sports flooring</li> </ul>	\$645,236
IJ Coady	<ul style="list-style-type: none"> <li>•Building shell</li> <li>•Interior renovations</li> <li>•Equipment repairs</li> <li>•Sports flooring</li> </ul>	\$243,990
McClelland	<ul style="list-style-type: none"> <li>•Building shell</li> <li>•HVAC upgrades</li> <li>•Condenser replacement</li> <li>•Sports flooring</li> </ul>	\$232,022
GM Countryside	<ul style="list-style-type: none"> <li>•Interior renovations</li> <li>•HVAC equipment</li> </ul>	\$26,212
<b>Total</b>		<b>\$6,542,647.00</b>

## Current Status

### Indoor Turf Facilities

As noted in previous reports, with the closure of the Exhibition Centre there are currently no indoor turf facilities in the City of Greater Sudbury. Indoor soccer is currently being played in local gymnasiums.

Prior to the closure of the Exhibition Centre, approximately 60 hours per week were booked for indoor soccer and other field sports.

### Field Users Participation Figures

The following information regarding 2016 participant numbers was provided to the City by outdoor field users. Information includes soccer participation as well as participation in other field sports, some of which may use an indoor turf facility.

2016 Outdoor Field Users by Sport	
Total soccer participants	4,688
Total baseball/softball participants	5,476
Total football participants	254
<b>Total field participants</b>	<b>10,418</b>

2016 Outdoor Field Users by Youth/Adult	
Total youth participants	5,762
Total adult participants	4,656
<b>Total field participants</b>	<b>10,418</b>

### Preliminary Demand Analysis – Indoor Turf Facilities (MBPC)

Research by MBPC indicates that the ratio of outdoor to indoor soccer players was 3 to 1 in Ontario in 2015. Assuming that one-third of all outdoor soccer registrants (estimated at 4,700 participants) would utilize an indoor facility (provincial average), indoor soccer demand is estimated at 1,570 participants.

According to MBPC the average indoor soccer program requires 1 hour per week on an indoor field for about every 25 players (ratio can vary depending on the age of the participant, the level of competition and the type of activity). Applying this ratio to the projected number of participants results in demand for 63 hours per week for indoor soccer activities.

MBPC provides a preliminary estimate of 19 hours per week which can be expected from non-soccer groups based on typical indoor turf facility usage profiles.

## Ice Utilization

The Arena Renewal Strategy (2013) found that the prime utilization rate had been declining since the 2008/09 season, with shoulder hours (those at the edges of prime time) mostly affected. The following table identifies the number of hours booked during prime (PT) and non-prime (NPT) hours since the Arena Renewal Strategy was prepared and reveals a similar downward trend.

<b>Weekly Utilization at all City Arenas, 2013/14 to 2016/17 (winter season)</b>				
Season	2013/14	2014/15	2015/16	2016/17
Number of Ice Pads	16	15*	16	16
<b>Prime Time Usage (weekly)</b>				
Youth Hours	723.5	677.5	690	690.5
Adult Hours	159	149.5	151.5	137.5
Other Hours (public skating, maintenance)	19.5	18	19	20.5
Available Hours	170	160	211.5	223.5
PT Usage - Citywide	84%	84%	80%	79%
PT Usage – Sudbury Arenas**	89%	90%	89%	87%
PT Usage – Outlying Arenas***	81%	80%	75%	74%
<b>Non-Prime Time Usage (weekly)</b>				
Youth Hours	103	91	96	90.5
Adult Hours	56.5	63	52	53.5
Other Hours (public skating, maintenance)	203	194.5	201	187.5
Available Hours	141.5	129	155	172.5
NPT Usage - Citywide	72%	73%	69%	66%
NPT Usage – Sudbury Arenas**	87%	86%	83%	76%
NPT Usage – Outlying Arenas***	62%	64%	60%	59%
<b>Overall Usage (weekly)</b>				
Overall Usage - Citywide	80%	81%	77%	75%
Overall Usage – Sudbury Arenas**	88%	89%	87%	83%
Overall Usage – Outlying Arenas***	75%	75%	70%	70%

Notes:

\*Chelmsford Arena was closed in 2014/15 for refurbishment

\*\* Sudbury Arenas include Cambrian, Carmichael, Gerry McCrory Countryside (2), McClelland, and Sudbury Arena

\*\*\* Outlying arenas include Capreol (2), Centennial, Chelmsford, Dr. Edward Leclair, Garson, I.J. Coady, Raymond Plourde, T.M. Davies, and Toe Blake

Prime time is defined as 8am to 12am on Saturday and Sunday and 5pm to 12am Monday to Friday

Non-prime time is defined as 7am to 8am on Saturday and Sunday and 9:30am to 5pm Monday to Friday

Source: City of Sudbury Arena Logs

In the past four seasons, overall arena usage has declined from 80% to 75%. These declines have occurred equally in both prime and non-prime times, in arenas within Sudbury and as well as outlying areas. For the 2016/17 season, prime time usage was 79% and non-prime time usage was 66% across all arenas. Usage is consistently greater for arenas in Sudbury compared to those in outlying areas – 83% versus 70% in 2016/17.

### **Ice Sports Participation Numbers**

Based on participant numbers provided by minor sports associations (hockey, figure skating, ringette) using City arenas, the total number of organized youth participants decreased from 6,459 in the 2011/12 season to 5,767 in the 2016/17 season, a decrease of 692 players (11%).

With 27,175 residents in Greater Sudbury's 5-19 age cohort (adjusted for undercount) and 5,767 registrants (2016 data, 21.2% of children and youth participate in organized ice sports (a reduction from 23.5% in 2011).

### **Preliminary Demand Analysis – Arenas (MBPC)**

The Arena Renewal Strategy established a market-specific demand target of 1 ice pad per 405 youth registrants.

With a supply of 16 rinks and 5,767 youth registrants, there is currently an average of 360 players per rink (the average was 451/pad in 2008/09 prior to the twinning of Gerry McCrory Countryside). Based on the recommended target of 1 pad per 405 registrants, there is City-wide demand for 14.2 rinks, indicating a surplus of nearly two pads.

### **Preliminary Findings (MBPC)**

#### **Indoor Turf Facilities**

The demand for indoor turf facilities (for all indoor field sport uses) in the City of Greater Sudbury is currently estimated at 82 hours per week. Assuming an average weekly capacity of 60 hours, this translates into a current demand for 1.4 small fields.

If a new facility were to be built, it is recommended that it be appropriately designed to accommodate the current market size. Two small fields can be accommodated on a pitch measuring approximately 200 by 200 feet (excluding run-out space and a clubhouse building). This is about half of the FIFA size field (400 by 200 feet).

If the facility is proposed as a permanent structure, a building that can house two small fields would be appropriate.

There is, however, an economy of scale that is realized in construction, particularly if the facility is an air-supported dome installed over an existing artificial turf field. While the demand analysis indicates that the full field does not need to be bubbled to meet community needs, there may be other circumstances that would merit the full field enclosure. This should be explored further with the primary user groups.

## Arenas

Analysis identifies a surplus of 1.8 ice pads at present. There is insufficient support for expanding the supply of municipal arenas in the short and longer term. A surplus of ice exists in the City, which is expected to worsen over the short-term. The impact of this surplus is affecting utilization of the City's outlying areas; however, the desire for equitable geographic distribution is also a consideration.

Any future arena construction should be in the form of replacement facilities, with consideration to multi-pad designs where supported by demand.

## Next Steps

The information provided in this report will form the basis for the development of a framework to guide decisions related to partnering for the delivery and provision of recreation services and facilities, including indoor turf and multi-purpose facilities. Additional analysis will also form part of a final report.

The framework and decision process to be developed by Monteith Brown Planning Consultants will include the following:

- Evaluating the potential demand for indoor turf and/or multi-purpose facilities in Greater Sudbury based on readily available information, using the 2014 Parks, Open Space & Leisure Master Plan Review as a point of reference.
- Reporting on indoor turf facility provision and operating models employed in other Ontario communities.
- Establishing a process to evaluate proposals for the development of these types of facilities.
- Identifying next steps in the form of an implementation plan.

The framework and decision process will be included as a report to the Community Services Committee by September 2017.

## Summary

The following conclusions are based on the information provided in the report:

- The City of Greater Sudbury can support an indoor turf facility with two small fields on a pitch measuring approximately 200 by 200 feet (excluding run-out space and a clubhouse building).
- Usage is greater for arenas in Sudbury compared to those in outlying areas (83% versus 70% in 2016/17).
- There is currently a surplus of 1.8 ice pads in the City of Greater Sudbury.
- Greater Sudbury's arenas are approaching or beyond their functional life cycle, based on industry standards.
- Any future arena construction should be in the form of replacement facilities, with consideration to multi-pad designs



## References

Indoor Turf and Multi Purpose Facilities Report, Community Services Committee (April 3, 2017)

<https://agendasonline.greatersudbury.ca/index.cfm?pg=agenda&action=navigator&id=1151&itemid=12457&lang=en>

City of Greater Sudbury Multi-Use Recreational Complex Feasibility Study (2007)

[http://www.greatersudbury.ca/content/div\\_councilagendas/documents/Multi\\_Use\\_Recreational\\_Complex\\_Report\\_Nov\\_7\\_2007.pdf](http://www.greatersudbury.ca/content/div_councilagendas/documents/Multi_Use_Recreational_Complex_Report_Nov_7_2007.pdf)

Arena Renewal Strategy, Community Services Committee (January 21, 2013)

<https://agendasonline.greatersudbury.ca/index.cfm?pg=agenda&action=navigator&id=585&itemid=6394&lang=en>

Parks, Open Space and Leisure Master Plan Review (2014)

[https://www.greatersudbury.ca/sudburyen/assets/File/Leisure%20Master%20Plan%20Review%202014\(1\).pdf](https://www.greatersudbury.ca/sudburyen/assets/File/Leisure%20Master%20Plan%20Review%202014(1).pdf)