



City of Airdrie 2023 Arena Analysis within SW Recreation Multi-Use Facility

Final Report | November 2023




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Executive Summary

The City of Airdrie has committed to undertaking a long-range planning exercise for the development of a new multi-use community recreation complex which will include several core users including a first phase aquatics center, a second phase arenas development plan and potentially another project phase comprising dry use space such as a field house.

Specific to the arena component, the City has identified the important question of where the balance lies between opportunities for spectator and market event center functions and the necessity to meet the demands for community access to facilities. In this regard, the City of Airdrie has retained Sierra Planning and Management to provide consulting services to assess the market opportunity, localized need, and overall viability of event functionality, including those associated with a high-performance sport team, within the future Southwest Recreation Facility.

In summary, this report establishes and tests the core purpose of the facility as both a venue for regional events which support the economic development objectives of the City, and a community facility which meets the needs of the resident community for recreation, leisure, and entertainment.

A Growing City and Region

The report lays out the historic and projected growth dynamics of Airdrie, the broader region of Rocky View County, as well as the north end of the City of Calgary. Overall, it can be concluded that Airdrie and those areas in proximity to the City are set to see significant growth over the next decade and beyond.

Between 2012 and 2016, Airdrie grew by over 16,000 residents (35%), exceeding population projections in place at the time. The City's Growth Strategy Update (2018) provides population projections for the 50-year period from 2015 (population of 58,690) to 2065. The Base Scenario projects that the City will grow to 168,468 by 2065, representing an average annual growth rate of 2.1% over the 50-year period. The more aggressive Alternate Scenario, projects that the population will reach over 200,000 residents by 2065 – an average annual growth rate of 2.6%.

With such growth anticipated in the City of Airdrie appropriate planning for future indoor and outdoor recreation facilities is required. As such, the City of Airdrie undertook a recreation facility needs assessment, which provides baseline information to inform the development of strategies and recommendations for new recreation infrastructure in the City. The outcomes of the study have directly informed the planning for the Southwest Recreation Facility.

Current and Future Indoor Ice Needs

Details related to the existing supply of ice in the City (5 pads), their usage (95% booked during prime time), and the current standard of provision for ice pads on a per population basis (1 pad per 16,000 population) are provided in Section 3 of the report. The broader regional supply (2 additional pads) and provision standard (1 pad per 18,500 population) is also considered. Based on the details provided in the report, it can be concluded that the City's ice supply is currently

meeting most needs based on the existing population, and in a regional context, and therefore, the focus should be on meeting the supply needs of the rapidly growing population.

Alternative perspectives on appropriate levels of provision for ice are provided, including the Long Term Athlete Development (LTAD) Model, Hockey Alberta's urban and rural zones, and participation-based standards.

Section 4 provides an indication of the ice supply deficit by 10-year time periods, which enable the City to continually assess the future ice requirements as it is planning for, funding, and developing the rinks. The outcomes of this analysis conclude that considering the base population projections for the City, the need is 2 net new ice surfaces in service by 2035 and 3 to 4 by 2045. This is in line with the participation-based standards of provision. At a higher level of anticipated population growth in the City, a net need for 3 additional indoor ice surfaces (community use, NHL regulation size) by 2035. By 2045, net requirements are an additional 5 indoor ice surfaces over and above the 5 in operation at the City currently.

General Strategy for Indoor Ice in Airdrie

Based on the analysis detailed in the report, the recommended strategy for indoor ice at the Southwest Recreation Facility is focused on developing a twin pad arena initially and depending on the land available the potential to implement two-additional pads as an expansion over the long-term. However, implementation of this strategy will be contingent on several considerations for site planning, as identified in Section 4.5.

As an existing facility, the Plainsmen Arena is an important arena to the overall ice supply in the City. Recent investment into this arena is a sunk cost, and small investment to maintain the facility in a state of good repair would keep it sustainable for another 20 years. Therefore, it should be maintained over this period, and could be decommissioned when the third multi-use facility is underway.

Recommended Development Concept for the Southwest Recreation Facility

Section 7 details the recommended development concept for the SW Recreation Facility arena component – a twin-pad facility with one community arena and one large capacity arena with seats. It is important to not that the development of an event centre is not being recommended at this time based on a common understanding of the nature of that building type. The event capacity that we strongly promote is one of developing a large capacity arena with amenities that enable an event experience that is comparable to other modern arenas that also host a range of sporting and non-sporting community-oriented and commercial events. The report also provides details of the types of considerations and range of needs required to accommodate a high-performance sport team, such as the AJHL or otherwise.

While the report indicates the large capacity arena as being in the range of 2,500 seats, it should be noted that at this point in the planning process, it is the general concept that is being recommended – upsizing one arena to be able to accommodate a variety of events in addition to community use.

Potential Scale of Capital Costs

The report lays out the potential scale of capital costs for a basic community twin-pad arena, and the estimated cost increment to improve the capacity of one of the rinks to be a large capacity arena with seats as recommended. Details of these costs are provided in Section 7.4 and summarized below.

	Estimated Facility Area (Sq. Ft.)	Total Project Cost Range (2023)	
		/Sq. Ft.	Total
Basic Community Twin-Pad Arena	93,000	\$625 - \$650	\$58M - \$61M
Modest Large Capacity Arena with Integrated Second Community Ice Arena	114,000	\$625 - \$680	\$71M - \$78M
Incremental Parking Needs (Subject to Traffic Impact Analysis)	500 spaces (surface) – equivalent to 5 acres		Approx. \$3.75 million

Potential Scale of Operating Financials

The report identifies potential financial implications of a new arena facility as well as considerations related to facility operations and management. While it is not appropriate at this stage of the planning process to provide details of a required operating budget or revenue projections, it can be stated that the City’s existing approach to cost recovery has been successful, and it is assumed that this model will be employed in its future recreation centres going forward.

For purposes of this report, we assume that the per pad annual operating deficit for the baseline provision of community ice arenas is \$250,000 per pad subject to annual escalation. This section also provides the assumption of a net incremental increase in the annual deficit for the large capacity arena with seats of \$250,000 plus annual escalation. Therefore, the total deficit of the recommended twin arena facility that includes a large capacity arena as a business unit within the Southwest Recreation Facility would be in the order of \$750,000.

Community Use, Event Potential, and Economic Impacts

The facility will be primarily a community arena but with increased spectator and event hosting capacity. Developing one of the arenas as a large capacity arena with seats enables the potential for a range of sporting and non-sporting events to take place. Such a facility provides a wide range of community offerings while keeping local spending local and attracting visitors and spending from outside of the resident community.

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Section 6 assesses the relative market potential for these types of events to occur within the SW Recreation Facility. It is concluded that events that have the potential to occur at this facility are largely focused on ice and dry floor games and tournaments, competitive bid opportunities, some family entertainment, and smaller-scale trade shows and conferences. The occurrence of the latter two items depends largely on the design and flexibility of the bowl (i.e., removal of the boards, flat floor loading, etc.).

From a sport tourism lens, with the development of a large capacity arena as part of the Southwest Recreation Facility, the potential to attract competitive bid events is evident, where the City's existing arenas do not have the seating capacities required for some regional and provincial events.

In terms of potential economic impacts from these and other events, when compared to larger event centres, these smaller venues, of course, have a smaller impact that are much more local in nature. Section 9 of the report assesses three hypothetical events in terms of their economic impacts, which are each estimated to be in the \$200,000 to \$400,000 range for initial expenditures.

An assessment of the Benefit-Cost Ratio (BCR) is also performed, a measure of the expected benefits of a project relative to the costs, expressed generally in monetary terms. A BCR greater than (>) 1 = project has value to proceed (analytically). Even with a full accounting of capital costs and a more modest assessment of revenues in the form of economic impact, the project registers a positive benefit-cost ratio (1.08). This is indicative of the strong potential associated with this project, and the City of Airdrie, if conceived of as an enhancement (or upscaling) of community infrastructure in response to the market opportunities for event hosting and sport tourism.

Next Steps for the City's Project Team

This report answers the requirements of the terms of reference as set out in the City's RFQ. Specifically:

- Primary research across multi-use facilities, including those that include a large capacity spectator bowl.
- Engagement with local arena sport user groups.
- Assessing the facility requirements of attracting a high-performance sport team.
- Assessing the feasibility of attracting events.
- Determine the nature and scale of the arena phase to be built within the overall site plan.
- Determine the amount of use allocated towards local community use and high-performance sport and other events.
- Financial analysis of operational cost recovery and estimated capital costs.

The immediate next step for planning moves into a master planning exercise for the facility and site. This which will get into the details related to design alternatives, site fit, how much land is available, etc., and should include:

- **Concept design and functional space program** – should be undertaken for all three phases of development at one time. The development of multiple scenarios would be helpful (i.e., with/without fieldhouse, variety of scales, design options for large capacity arena). We would recommend that for planning purposes the bowl should be designed at 2,500 seats.
- **Site Planning and Site Fit Exercise** – based on the concept options developed.
- **Detailed Feasibility Study and Business Case** – based on the preferred concept options a more detailed feasibility and business case assessment should be undertaken.

Additionally, and in concurrence with the above, the City should move forward with developing a Sport Tourism Strategy to establish its priorities in this regard.

1 Introduction and Objectives

1.1 Project Background

The City of Airdrie has committed to undertaking a long-range planning exercise for the development of a new multi-use community recreation complex which will include several core users including a first phase aquatics center, a second phase arenas development plan and potentially another project phase comprising dry use space such as a field house. The City's commitment to this project includes the identification of a 32-acre parcel of land located in the City's southwest for the development of a modular recreation complex over a number of years in three (3) distinct phases.

Before embarking on site master planning, the City needs to determine the size, scale, and type of arenas that could make up a second phase so that facility systems, site access, and common spaces are planned and built appropriately during the first phase of construction.

Specific to the arena component, the City has identified the important question of where the balance lies between opportunities for spectator and market event center functions and the necessity to meet the demands for community access to facilities. In this regard, the City of Airdrie has retained Sierra Planning and Management to provide consulting services to assess the market opportunity, localized need, and overall viability of an event center function within the future community recreation center. This work is focused on the extent to which the seat count should be between 1,500 to 2,500 fixed seats. At this time, the focus is on initial likelihoods and transferring those into the scale of the large capacity arena with seats and aligning it to the number of rinks required to be built as part of the second phase.

1.2 Objectives of the Report

This report comprises a market opportunities analysis of the local need and viability of a large capacity arena within a multi-use recreational facility, owned and operated by the City of Airdrie. Note there are reasons why this model of operation is important, and these will be discussed in the report. This report establishes and tests the core purpose of the facility as both a venue for regional events which support the economic development objectives of the City, and a community facility which meets the needs of the resident community for recreation, leisure, and entertainment.

The report includes an assessment of the market conditions, probability, and readiness of Airdrie attracting a high-performance sport team (AJHL/WHL) in the arena phase of the planned Southwest Recreation Facility and the associated infrastructure/implications to attract such. In addition, the assessment details the expected frequency and implications of hosting special events (concerts, championship showcases, etc.) within a large capacity arena if built for a high-performance sport team.

Specifically, this report includes the following analysis:

- Identification and research related to multi-use facilities, within a similar municipal context, specific to those that include a spectator/event seating bowl.
- Engagement with local arena sport user groups on their needs and priorities for community arena and spectator facilities.
- Assessing the feasibility of attracting a high-performance team within a community multi-use recreation centre and its likely range of facility/municipal partnership needs. This analysis assesses the localized market in relation to the larger draw of metropolitan Calgary and draws upon examples from municipalities of similar size and demographics to Airdrie.
- Assessing the feasibility of attracting other sporting and/or non-sporting events (concerts, provincial/national competitions, etc.) within a community multi-use recreation centre large capacity arena.
- Determining the appropriate nature and scale of the planned arena phase to be built within the overall site plan that supports the findings of the high-performance sport market analysis, special event analysis, and community needs assessment/engagement. This includes determining the number of ice sheets required, spectator seating, supportive spaces, parking, site access, impacts on other uses, etc.
- Developing an indicative operating plan, complete with seasonal facility programming plan and utilization pro forma for all ice sheets. Details related to the amount of use allocated towards local community use to address local sport needs, and expected hours allocated towards high-level competition/events.
- Financial analysis for operational cost recovery and estimated capital costs of various configurations of the arena phase.

Contribution to Long-Range Infrastructure Planning

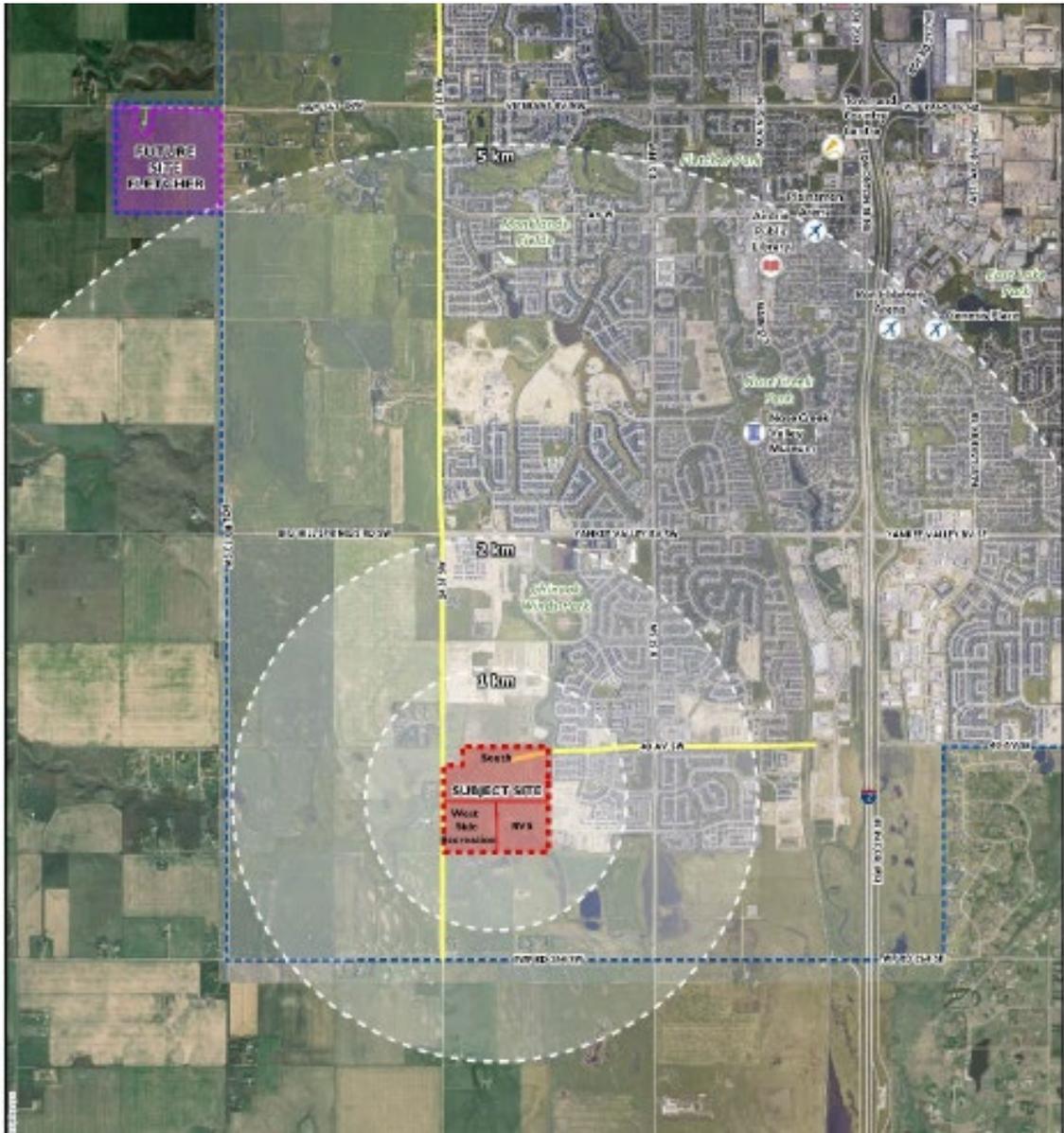
The development of the Southwinds site for both a new high school and the recreation complex is part of the City's and School District's ongoing commitment to long range planning and infrastructure development. The selected site, identified as a municipal reserve of land for both developments, is approximately 45 acres. It is understood that the land available for the school is identified as 13 acres, leaving approximately 32 acres available for the recreation complex. It is understood, however, that the school may require up to 20 acres, meaning that there will need to be some sharing of land between the two owners. The site is well situated in proximity to the new 40th Avenue interchange and extension an east - west arterial road that sits near the north edge of the Southwinds neighbourhood.

The Southwinds NSP indicates that the joint recreation complex and High School site will serve as a district level open space node. The planning and design of this site will be completed by the City of Airdrie and Rocky View Schools, the owners of the site. The site is well situated in

proximity to the new 40th Avenue extension an east - west arterial road that sits near the north edge of the Southwinds neighbourhood.

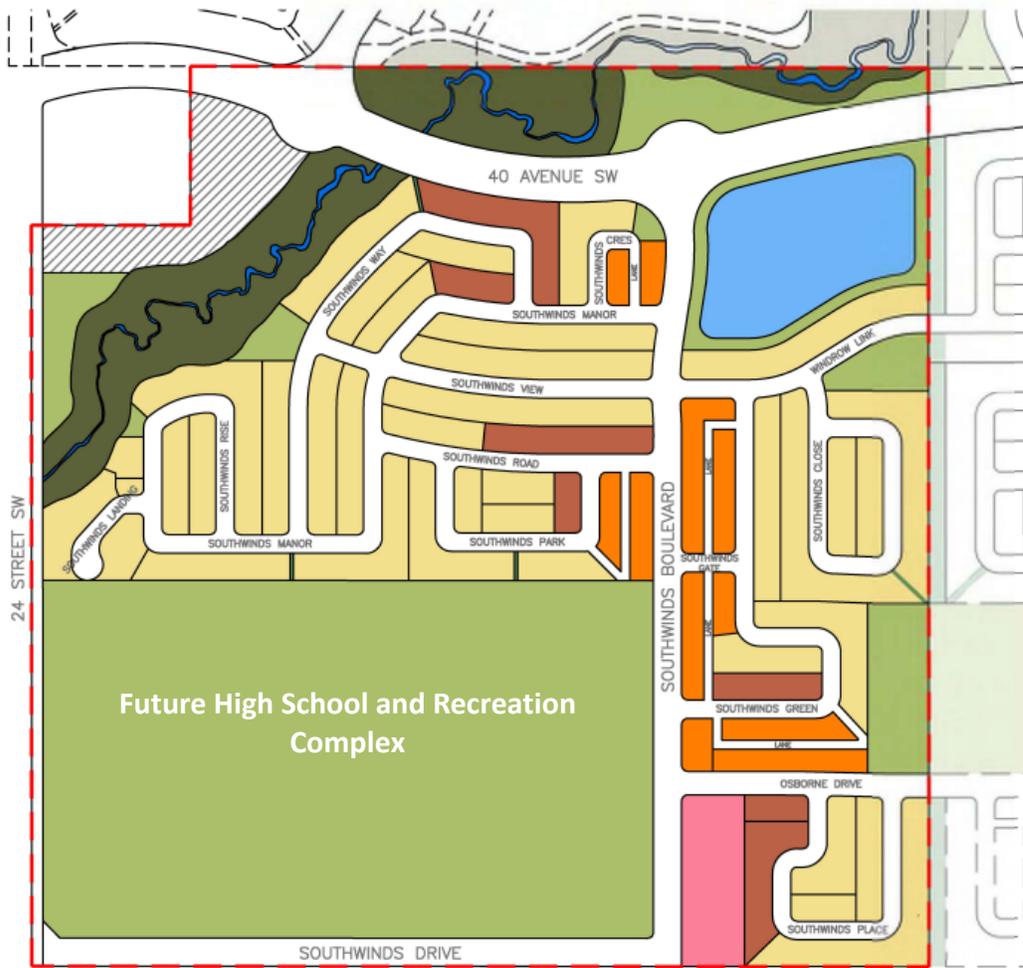
It should be noted that a secondary site for future recreation facilities has been identified. This is in the City's west end (on Veterans Blvd NW) and is shown in purple on the map below.

Exhibit 1: Community Facilities Planning Context Map



Source: Southwest Recreation Facility Summary Report, 2023.

Exhibit 2: Southwinds Neighbourhood Structure Plan Land Use Concept



LEGEND:

- | | | |
|---|---|---|
|  NSP Boundary |  Low Density Residential |  Medium Density |
|  Medium Density (Laned) |  Urban Holdings (TBD) |  Commercial |
|  Municipal Reserve/
Joint Use |  Municipal Reserve
(Non-Credit) |  Environmental Reserve |

Source: SPM based on City of Airdrie Neighbourhood Structure Plan for Southwinds

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The City of Airdrie is understood to be commissioning a site planning exercise to determine the configuration of the overall site between the recreation complex, the school, required dedicated ancillary lands for each and any shared use opportunities. This, together with a full understanding of the traffic demand needs and traffic impacts arising from development, is part of the initial development of site and functional space programs, concept plans and eventually a more detailed design process.

It should be noted that recreation complexes have large footprints, and the desire for the most efficient layout, operational efficiencies and reduced capital costs result in many of these buildings being single storey or partially two storey. While higher density, high land value jurisdictions are increasingly open to the idea of alternative design and operation of community recreation complexes to overcome the land shortage and/or price, the project in Airdrie is contemplated as a traditional space extensive recreation complex. As a result, there is a definitive question of whether the site will provide sufficient land to accommodate long term needs. This report provides some guidance in that regard.

Transitioning to an Urbanized Community and Capturing Commercial Events Potential

The rapid growth of the City over the next 30 to 40 years signals that the City can no longer be regarded as a small town serving a rural market place. The trade area of the City will for the foreseeable future include large pockets of rural land but the nature of the City, its range of services, balance of housing versus local job growth, its cultural profile, and fiscal capacity to absorb growth and plan for infrastructure can all be expected to change.

This transition, which may open up access for businesses and services to the large Calgary market to the south as development pushes north between the Cities, is underway and will impact the consumption of services such as recreation. It will also require a reconsideration of the appropriate level of municipal recreation service as the City transforms from rural market town to one of the largest municipalities by population count, in the province.

The current and future level of service in community access to indoor recreation, as well as the opportunities for sport tourism, and economic development arising from strong growth and a strategic location, are important. Addressing the question of whether there is merit in developing an event centre concept in the City, requires a review of each of these pillars of community need and economic opportunity.

1.3 Limitations of Analysis

The contents of this Report and the analysis herein is based, in part, upon a range of primary analyses and secondary sources of information, supplemented where required by investigative discussions with municipal staff and community organizations. While every effort is taken to ensure the accuracy of secondary sources of information, Sierra Planning and Management cannot warranty the accuracy of this information. If secondary source information is inaccurate or incomplete, Sierra Planning and Management will not be held liable for original errors in data.

This report is presented on the condition that the recommended additional studies and analysis outlined in the report are undertaken as part of the next steps toward realization of the arena component of the Southwest Recreation Facility. Accordingly, the reader is advised that final decisions regarding the commitment of capital dollars to the construction of the facility should be based on further design, site planning and costing as recommended in this report.

The report, and the information contained within it, is prepared specifically for the purposes as laid out in this report. Reliance on information and opinions contained in this report for other purposes, or extracted in part from the entire report, is not recommended.

The financial feasibility analysis is undertaken as a baseline assessment of costs and revenues under normalized operating conditions after a period of 1 or 2 years of ramp-up in both costs and revenues to operate at maximum utilization. The capital costs identified in this report represent an order of magnitude assessment based on a Class D estimate of costs – in the absence of a specific concept design or confirmation of a functional space program for the building.

2 Growth Dynamics and Policy Response

This section provides an understanding of the historic and projected growth dynamics of Airdrie, the broader region of Rocky View County, as well as the north end of the City of Calgary. Overall, it can be concluded that Airdrie and those areas in proximity to the City are set to see significant growth over the next decade and beyond.

With such growth anticipated in the City of Airdrie appropriate planning for future indoor and outdoor recreation facilities is required. As such, the City of Airdrie undertook a recreation facility needs assessment, which provides baseline information to inform the development of strategies and recommendations for new recreation infrastructure in the City.

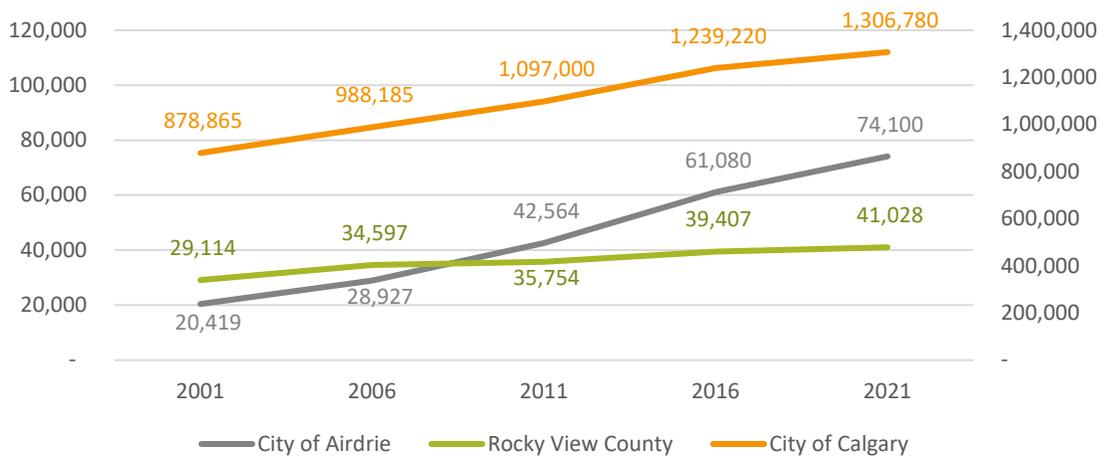
This section also speaks to the potential for Airdrie as it relates to sport tourism, how the City has been successful in this regard in the past and highlights some trending areas for future focus.

2.1 Rapid Population Growth in Airdrie

The City of Airdrie is a single-tier municipality surrounded by Rocky View County, a mostly rural municipality with a dispersed population. Located 15 minutes north of the Calgary International Airport and 30 minutes north of downtown Calgary along the Queen Elizabeth Highway, the City of Airdrie has experienced significant population growth over the past decade.

Over the past two decades Airdrie has experienced substantial population growth, going from just over 20,000 residents in 2001 to nearly 75,000 residents in 2021. This represents a growth rate of 263%, which is significantly higher than that experienced in Rocky View County (41% growth rate over same period) and the City of Calgary (49%).

Exhibit 3: Historical Population Growth, 2001-2021



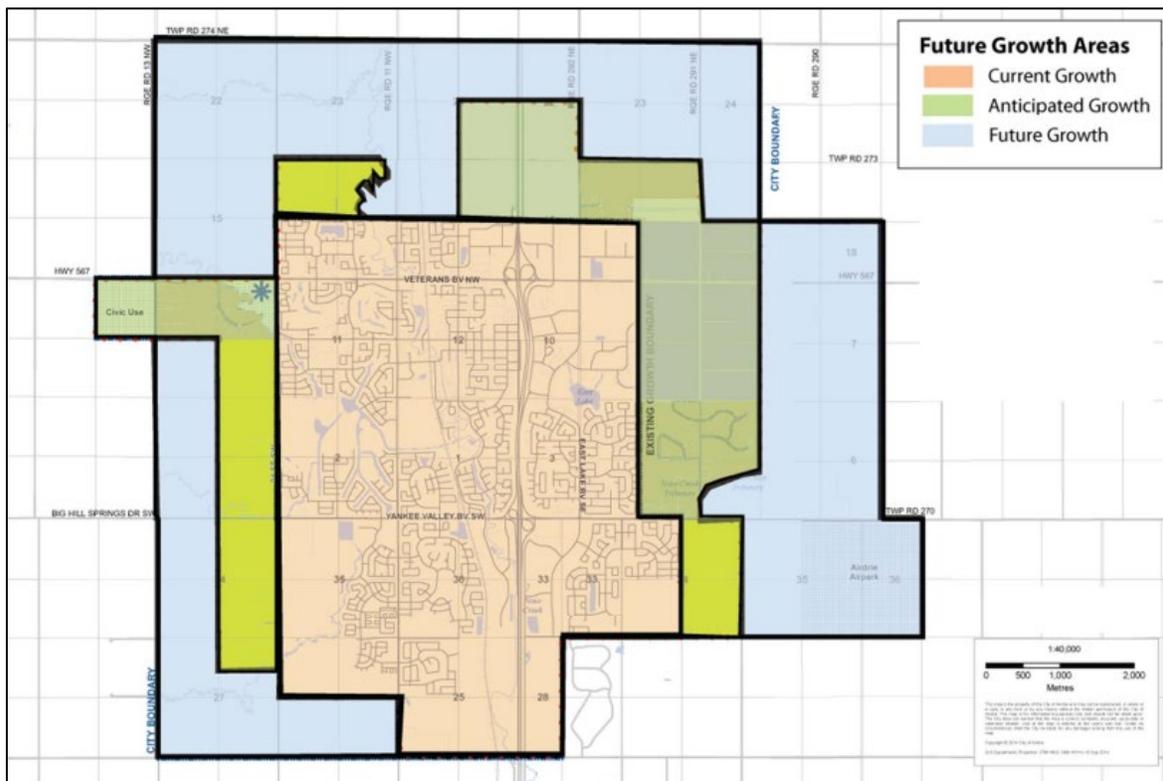
Source: SPM based on Statistics Canada Census Data, 2001, 2006, 2011, 2016 and 2021.

2.2 Long-Range Growth Planning

The Airdrie City Plan (2014), the City’s Municipal Development Plan (MDP), provides a vision for the community that reads “Airdrie is a vibrant, caring community rich in urban amenities and opportunities for everyone. We value a healthy, sustainable environment connecting people and places.” It lays out key directions and policies on land use matters such as population growth, development patterns, economic development, transportation planning, and utility servicing.

With such rapid development occurring within the city limits, Airdrie took proactive steps to expand the municipality by annexing land from Rocky View County to accommodate future growth. In 2012, the City annexed 12,600 acres to more than double the land base from 8,179 acres to 20,819 acres. This additional land was intended to provide a 50-year land supply for the City to provide services, amenities and housing. These annexed lands were delineated into first priority and second priority for servicing. The lands that are set to accommodate future growth are generally shown in the exhibit below as the Anticipated Growth and Future Growth Areas.

Exhibit 4: Identified Growth Areas in Airdrie



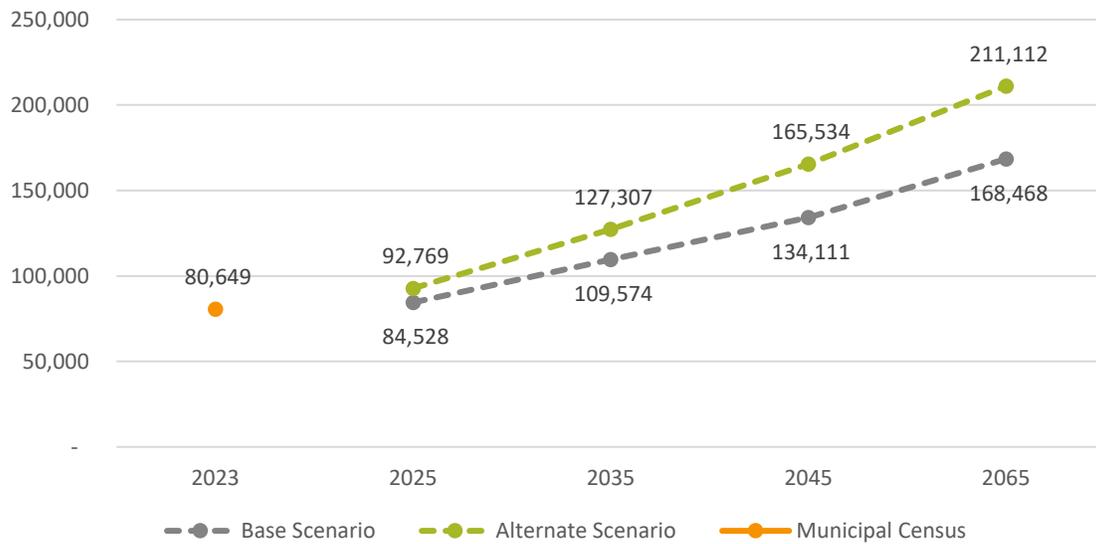
Source: City of Airdrie Growth Strategy Update, April 2018.

From the time of annexation to 2016, the City grew by over 16,000 residents (35%), exceeding population projections in place at the time. The City undertook an update to the 2011 Comprehensive Growth Study in 2018 which provided two scenarios for future growth so that the City can accurately plan land development and services. The City’s Growth Strategy Update

(2018) provides population projections for the 50-year period from 2015 (population of 58,690) to 2065.

The Base Scenario projects that the City will grow to 168,468 by 2065, representing an average annual growth rate of 2.1% over the 50-year period. The more aggressive Alternate Scenario, projects that the population will reach over 200,000 residents by 2065 – an average annual growth rate of 2.6%. Based on the Municipal Census undertaken by the City in 2023, population growth is on track to meet, and potentially exceed, the Base Scenario projections.

Exhibit 5: Projected Population Growth in Airdrie, 2023 to 2065



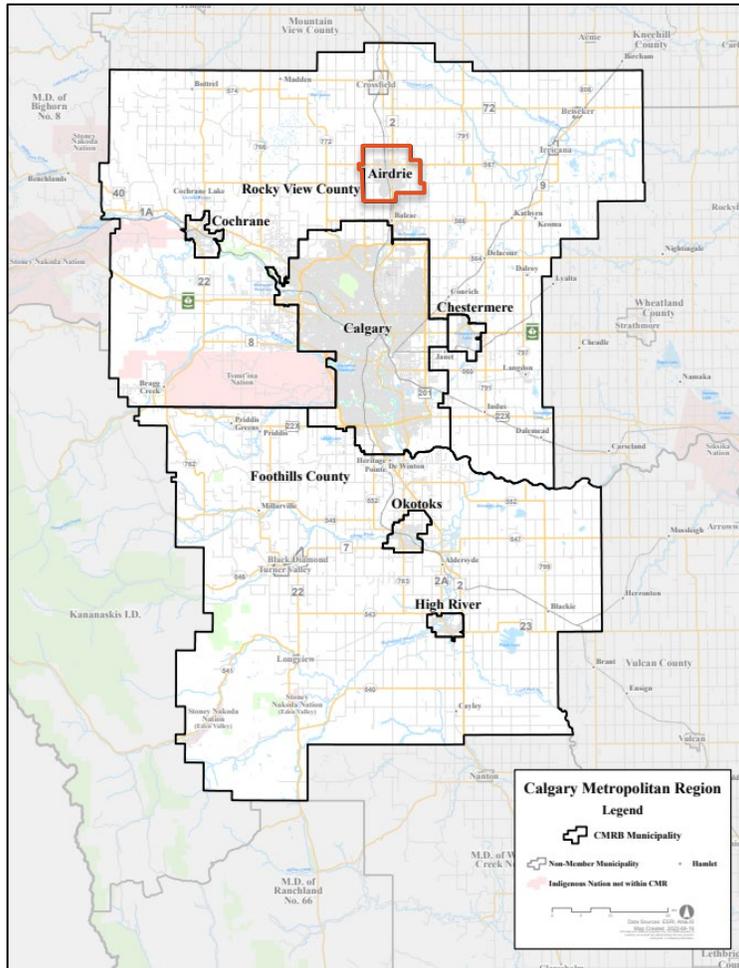
Source: SPM based on City of Airdrie Growth Strategy Update, April 2018; Airdrie Municipal Census, 2023.

It should be noted that the City produces an annual Growth Report for Airdrie, which tracks development and change. The most recent edition was released in 2022 and includes population forecasts for a 10-year period created biannually by City administration. These forecasts estimate Airdrie’s population to reach 109,103 residents by 2032.

2.3 A Changing Calgary Metropolitan Region

At a broader more regional level, the City of Airdrie is considered for planning purposes part of the Calgary Metropolitan Region (CMR). Airdrie is the second largest municipality within the CMR with the second largest share of regional population growth forecasted (7.2% to 2048). The area immediately surrounding Airdrie, Rocky View County, encompasses a wide variety of residential developments in 14 hamlets, and several country residential subdivisions.

Exhibit 6: Calgary Metropolitan Region Map



Source: SPM based on 2022 CMRB Growth Plan.

This area is poised to experience major growth over the next 30 years, mostly within the urban centres of Calgary, which is forecast to gain more than three-quarters of a million people, and Airdrie, set to gain over 75,000 new residents. Chestermere, Cochrane and High River will also experience high rates of growth over this time frame – many doubling or nearly doubling their population base.

It is important to note that the population projections completed for Airdrie within the CMR Growth Plan are lower than those projected in the City’s Growth Strategy Update but are included here for comparative purposes only and to provide a regional lens on population growth.

Exhibit 7: CMR Forecast Population, by Municipality, 2018-2053

Municipality	2018	2048	2053	% Change (35 yr.)
Airdrie	66,889	130,612	140,725	95%
Calgary	1,342,861	2,029,430	2,124,804	51%
Chestermere	21,619	49,632	54,147	130%
Cochrane	28,152	53,715	57,277	91%
Foothills	24,683	39,082	41,103	58%
High River	14,825	29,596	31,630	87%
Okotoks	31,439	58,653	62,658	58%
Rocky View	42,729	67,706	71,439	58%
Total	1,573,197	2,458,426	2,583,783	56%

Source: SPM based on 2022 CMR Growth Plan.

2.4 Calgary's Growing North End

Airdrie is not the only municipality within the CMR that is experiencing significant growth. The 2022 Citywide Growth Strategy Monitoring Report for Calgary states that "Calgary saw record breaking population growth in 2022." Being Canada's third largest city, Calgary had a population of 1.4 million in 2022 (an increase of 42,000 or 3%, over 2021). Of late, the City is experiencing record numbers of housing starts in order to accommodate this rapid growth, with 14,800 in 2022, representing an 88% increase over 2020 figures.

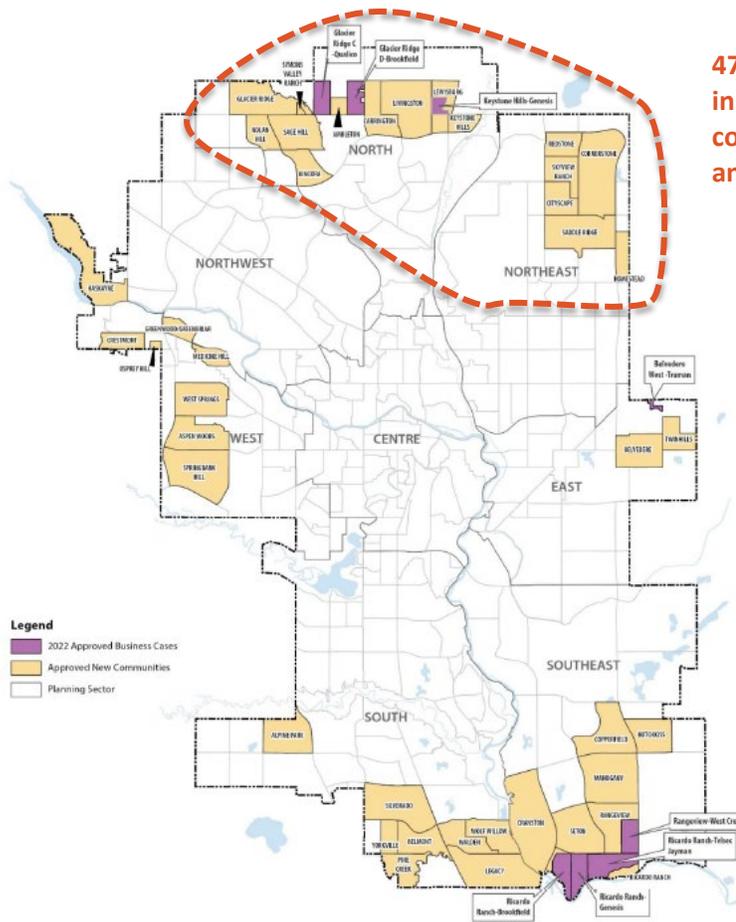
Growth in Calgary is largely focused in the northern and southern sectors of the City. The North and Northeast sectors accounted for 47% of building permits issued in 2022, while the Southeast and South sectors accounted for 42% of permits issued.

Exhibit 8: Calgary's Building Permits by Sector, 2022

Sector	Building Permits Issued in 2022	Share of Total
North	2,236	23%
Northeast	2,342	24%
East	210	2%
Southeast	2,126	22%
South	1,942	20%
West	691	7%
Northwest	273	3%
Total	9,820	100%

Source: SPM based on 2022 Citywide Growth Strategy Monitoring Report.

Exhibit 9: Calgary's New Communities and 2022 Business Cases



47% of building permits issued in Calgary (2022) were for communities in Calgary's North and Northeast sectors.

Source: SPM based on 2022 Citywide Growth Strategy Monitoring Report.

2.5 Recreation Facilities Planning

To appropriately plan for future indoor and outdoor recreation facilities in the community as it grows, the City of Airdrie undertook a recreation facility needs assessment. The intention of the Indoor and Outdoor Recreation Needs Assessment (completed by GEC Architects and HarGroup Management Consultants in February 2022) was to provide baseline information to inform the development of strategies and recommendations for new recreation infrastructure in the City. The outcomes of the study have directly informed the planning for the Southwest Recreation Facility.

In terms of community ice needs, the study identified the following for considerations:

- A strong desire by 43% of all residents to have access to spontaneous or unstructured use of ice surfaces.

- 14% of residents indicated that they or a member of their household intended on attending ice skating instruction activities.
- Ice user groups (both sanctioned and unsanctioned) are booking ice times in surrounding communities to accommodate their needs.
- Rocky View Schools utilize the arenas for school activities and sport performance classes on a regular basis.
- Utilization of the existing ice surfaces was pegged at 95% during prime time.

The Southwest Recreation Facility: Phased Approach to Development of Facility Components and Amenities Summary Report was completed in May 2023. The report looked at two options for the facility's focus: (a) the **Broadest Community Voiced Needs/ Priorities Option** would have an emphasis on recreational and leisure opportunities, and (b) the **Sport Focused Use Option** would be designed to accommodate competitive hosting requirements.

A Staff Report (dated May 8th, 2023) recommended that Council endorse the amenities contained within the initial phase of the planned Southwest Recreation Facility that addresses the broadest needs and priorities of residents.

The report findings were predicated on the fact that there is approximately \$80 million available for the first phase of the project. Phase one will contain aquatics, fitness centre, and a range of supportive spaces with arena facilities following in a second phase. The second phase may also include gymnasiums with a field house listed as a potential third phase amenity.

The report identified potential amenity solutions to address the expressed need for ice surfaces in Airdrie, including (a) NHL sized multi-sheet arena amenity, (b) leisure/half NHL sized ice surface amenity, and (c) performance ice surface/bowl seating amenity. Identification of these possible options, and determining the most suitable solution, is the foundation upon which the Arena Analysis project is based.

2.6 The Recognition of Sport Tourism Potential

Many communities across Canada are realizing the potential economic impacts that the sport tourism industry can bring, Airdrie included. While the City has not yet developed a Sport Tourism Strategy (it is soon to be developed), Airdrie's Economic Strategy (2018 – 2028) is centred on three objectives – The place to be, Right for business, and A connected community. The Economic Strategy speaks to growing the City's visitor economy by enhancing community spaces, amenities, and events, and notes the untapped potential of sport tourism.

Additionally, the City's Tourism Opportunity Assessment and Action Plan (2020) identified Sport Tourism as one of the top 5 tourism development opportunities for Airdrie that have the greatest potential for development in the short term. This opportunity is predicated on the City investing in sport facility infrastructure to accommodate hosting of successful events. More specifically, the action items identified in the Plan include:

- Invest in sport facilities to enhance sport tourism capacity and enhance resident quality of life.
- Take steps to ensure sport facilities are well prepared to host sport tourism events (e.g. operational policies, resourcing, planning, equipment, etc.).

Sport Tourism Canada (STC) considers sport events to be the “greatest underleveraged assets within the Canadian tourism industry”. The Canadian sport tourism industry has grown to over \$6.5 billion in spending annually.

Observed trends within the national sport tourism industry include:

- Team sport competitions such as soccer, hockey, volleyball, baseball, and basketball;
- Girls/women’s events;
- Marathons/triathlons;
- Masters level events;
- Cycling events;
- Parasports (sport for people with disabilities); and
- Extreme sports/X Games.

In 2020, Airdrie hosted the Alberta Winter Games, which ran from February 14 – 17. The city saw over 6,000 visitors, including over 2,800 athletes, coaches, and officials in attendance from across the province. As part of the Games’ legacy plan, the host committee transformed into the Airdrie Sport Council, which continues to support athletes, sport organizations and members of the sporting community in Airdrie. This event had a significant impact on the local economy including \$2.1 million in total net economic activity (GDP) for the City of Airdrie.

In 2019, Airdrie was host of the Accelerate Acro Convention, which was hosted at Genesis Place over three days in November. The local (city) economic activity generated from this event was over \$400,000 (net GDP).

3 Analysis of Current Indoor Ice Needs

This section provides details related to the existing supply of ice in the City (5 pads), their usage (95% booked during prime time), and establishes the current standard of provision for ice pads on a per population basis (1 pad per 16,000 population). The broader regional supply and provision standard is also considered. Alternative perspectives on the appropriate level of provision are discussed, including the Long Term Athlete Development (LTAD) Model, Hockey Alberta’s urban and rural zones, and participation-based standards.

Based on the details provided in this section, it can be concluded that the City’s ice supply is currently meeting most needs based on the existing population, and in a regional context, and therefore, the focus should be on meeting the supply needs of the rapidly growing population.

3.1 City Supply and History of Development

The City of Airdrie currently provides five indoor ice pads – two at Genesis Place (Shane Homes and Rocky View County), two at Ron Ebbesen Arena (Gold and Blue), and one at the Plainsmen Arena. The two pads at Genesis Place are part of a major multi-use community recreation centre that includes an aquatic centre, gymnasium, boarded indoor turf, and a variety of other spaces for recreation and leisure activities to take place. The Ron Ebbesen Arena is a twin-pad facility that includes a 150-seat licensed viewing lounge, while the Plainsmen Arena is a stand-alone arena with limited lobby and dressing room space. Details of each facility’s ice pads are provided below.

Exhibit 10: Airdrie Supply of Ice Pads Map

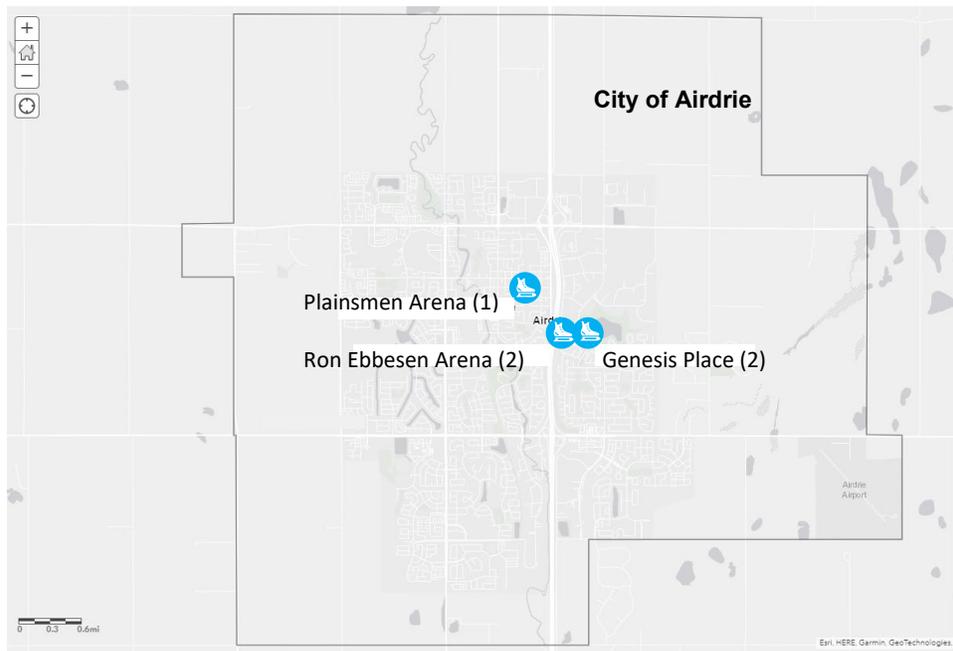


Exhibit 11: Airdrie Ice Pad Supply Details

Facility/Rink	Year Built	Ice Size	Seating Capacity
Genesis Place – Shane Homes	2012	NHL (200' x 85')	250, upper level
Genesis Place – Rocky View	2012	NHL (200' x 85')	250, upper level
Ron Ebbesen - Gold	1991	NHL (200' x 85')	200
Ron Ebbesen - Blue	1991	NHL (200' x 85')	460
Plainsmen	1974	Unknown	140

It is noted that the City also owns the Town & Country Centre, a dedicated curling facility. The facility has 8 curling sheets and is operated by the Airdrie Curling Club. For these reasons, it is not included in the indoor ice inventory for the city.

3.2 Relevant Regional Supply

Through discussions with key ice user groups in Airdrie, it is understood that ice is used on a regional basis and time is booked at several arenas within a short drive (15 minutes) of the City. This includes facilities in Beiseker, and Crossfield. It is also understood that ice rinks within the City of Calgary are fully subscribed and there is no additional capacity available for non-city users. For this reason, ice rinks in Calgary are excluded from the available regional supply. While beyond the 15 minute drive time, it is noted that the four ice pads in Cochrane are sometimes used for tournaments by the groups in Airdrie; however these facilities (identified on the map below) mainly serves Cochrane’s local needs and therefore have been excluded from the regional supply as well.

Based on this methodology, there are two additional ice pads within the broader regional supply – located in Beiseker (1), and Crossfield (1).

Exhibit 12: City and Regional Supply of Ice Pads Map



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Exhibit 13: Regional Ice Pad Supply Details

Municipality	Facility	Year Built	Ice Pads	Ice Size	Seating Capacity	Other Notes
Beiseker	Doug Hagel Arena	1974	1	Unknown	200 (est.)	Stand-alone arena
Crossfield	Pete Knight Memorial Arena	Unknown	1	Unknown	250 (est.)	Stand-alone arena

3.3 Resulting Current Service Standards

With a 2023 population of over 80,000 residents and a supply of 5 ice pads, the City of Airdrie is currently providing ice at a standard of 1 ice pad per 16,130 population.

Because it is known that ice is utilized on a regional basis, consideration of the regional standard of ice provision is also relevant. Airdrie and the surrounding area (including most of Rocky View County that is north of Calgary and excluding Calgary, as defined in Exhibit 12) has an estimated population of nearly 130,000 based on 2022 data from ESRI Business Analyst. With 7 ice pads in this area, the resulting standard of provision is 1 ice pad per 18,529 population. This is a similar standard of provision to that being provided in the City. If the ice pads in Cochrane were to be included in the regional standard it would result in a standard of 1 ice pad per 11,791 population.

Exhibit 14: Existing Population-Based Standard of Provision

	2023 Population	Ice Pads	Resulting Standard of Provision
City of Airdrie	80,649	5.0	1 ice pad per 16,130 population
Airdrie and Surrounding Region	129,705 ¹	7.0	1 ice pad per 18,529 population

Source: SPM based on City of Airdrie Municipal Census 2023 and ESRI Business Analyst data, 2023.

3.4 The Views of Community Users

The study process included engagement with a range of stakeholders to understand the current baseline of community needs and the planning strategy of each to meet future needs.

Interviews with key ice and dry floor user groups were conducted with the following groups:

- Airdrie Curling Club and Curling Alberta
- Airdrie Minor Hockey Association
- Airdrie Ringette Association
- Airdrie Skating Club
- Airdrie Sport Council
- Airdrie Stars Athletic Association
- Rocky View Lacrosse Association
- Rocky View Silvertips Lacrosse
- Village Sports

¹ 2022 Population estimates obtained from ESRI Business Analyst, 2023 for defined regional area.

These conversations, as summarized below, have provided the study team with insights on current usage, needs and future opportunities.

Several of the ice sport organizations indicated that the number of hours they are allocated by the City or are able book is limiting their membership numbers and ability to grow their organizations. These local groups often must travel to other arenas outside of Airdrie to be able to access ice including arenas in Crossfield, Beiseker, Cochrane, and beyond.

The limited ability of these organizations to host local, regional, or even provincial tournaments and events was also identified as an issue at present. The arenas in Airdrie have a limited seating capacity for spectators that often do not meet the hosting standards for larger events. The following summarizes potential events, by sport, and the spectator seating requirements and/or estimated attendance levels associated with each.

It should be noted that the Airdrie Curling Club operates the City-owned Town & Country Centre – an 8-sheet facility that has limited viewing opportunities and is therefore not ideal for hosting tournaments and events. Discussions with the Airdrie Curling Club and Curling Alberta indicated that, as one of the top clubs in the province, there is interest in hosting events in an arena facility that has appropriate spectator seating. At present, there is limited ice availability within the Airdrie region so that the club is unable to host events locally and must travel outside the region to host (e.g., the club recently hosted an event in Canmore).

Exhibit 15: Potential Event Landscape

Sport	Events	Estimated Spectators
Curling	<ul style="list-style-type: none"> Total of 64 events/year Mostly bid events National (Briar, Scotties, Grand Slams, etc.) Provincial (Men’s, Women’s, U18/U20, etc.) Regional (Rotary Championships, qualifiers, etc.) 	Briar (Men’s): 5,000 Scotties (Women’s): 3,500 Grand Slams: 2,000-2,500 Provincial Men’s: 1,000-1,500 Provincial Women’s: 800-1,000 Provincial U18/U20: 500
Hockey	<ul style="list-style-type: none"> Local association hosts 4 tournaments/year (would like to host 6/year) Mostly bid events Regional Provincial National (National Women's Under-18 Championship, World Junior A Challenge) 	National: 1,000–4,000
Ringette	<ul style="list-style-type: none"> Local association hosts 2 or 3 tournaments/year Mostly bid events Regional Provincial Semi-national/national (Western Canadian Championships) 	Semi-National: 600 minimum

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Sport	Events	Estimated Spectators
Skating	<ul style="list-style-type: none"> Local association hosts 1 event/year 	350 skaters/525 spectators (estimated at 1.5 spectators/skater)
Lacrosse	<ul style="list-style-type: none"> Canadian National Championships (1 week) Provincial championship (10 year rotation) 	Provincial: 600-700

Diversity, Equity, and Inclusion (DEI) was also a common theme heard from several of the user groups, including:

- Access to sports for all: Many associations indicated that they now offer “learn to play” sessions to introduce the sport to those that may not have played before.
- Gender equity: Lack of adequate and appropriate dressing room spaces at many of the existing facilities for girl and women teams (Plainsmen Arena was noted).

3.5 Utilization and Condition of Existing Facilities

Utilization

From a region-wide perspective, it is understood (through anecdotal discussions with facility management) that ice is in high demand by the community. Analysis of the utilization of the arenas in Airdrie indicates that demand for ice time is strong, especially during prime time (PT) with 77% of rentals occurring on weekday evenings and weekends. 95% of the available prime time is booked, with the remaining 5% of ice time typically leftover at the end of late evenings.

The City notes that it has had to deny ice time requests for prime time hours by user groups due to a lack of availability. In the 2022/23 season this equated to roughly 768 hours of prime time ice demand that could not be met (32 hours per week). Demand for ice is anticipated to continue to grow over time as the city experiences population growth and the youth population moves through the school system.

Exhibit 16: Prime Time Utilization Rate – All Airdrie Arenas Combined, 2022/23 Ice Season

	Total PT Available Hours	Total PT Booked Hours	PT Utilization (inclusive of floods between groups)
All Arenas	7,370	7,031	95%

Source: SPM based on data from the City of Airdrie

When looking at the total hours booked (including both prime time and non-prime time) Ron Ebbesen Blue had the highest number of rental hours (over 2,000 hours rented for the season), while the Plainsmen Arena had the lowest number of rental hours (nearly 1,500 hours rented).

Exhibit 17: Total Rental Hours, 2022/23 Ice Season

Arena	Total Booked Hours
Genesis Place – Shane	1,906
Genesis Place – Rocky View	1,871
Ron Ebbesen – Gold	1,805
Ron Ebbesen – Blue	2,018
Plainsmen Arena	1,475
Total	9,076

Source: SPM based on data from the City of Airdrie

It is understood, through engagement with primary user groups, that to accommodate the required ice needs, the groups regularly book ice outside of Airdrie in the surrounding communities and at private ice facilities. The Airdrie Minor Hockey Association, for example, books 8.4% of its total ice time at facilities outside of the city.

Hockey Alberta divides the province into 9 regions, most of which are rural zones with Edmonton and Calgary being the only urban zones. The City of Airdrie, a bedroom community of Calgary, lies within region 6 - a rural zone. This means that the length of time allocated to each minor hockey game is significantly longer than games that occur in urban zones in Alberta (and other provinces for that matter). All minor hockey games that are played in the rural zones are allotted 2.25 hours per game which includes flooding between each period. This contrasts significantly with games played in the urban zones where 1.5 hours is allotted, with flooding after the 2nd period only. This difference in time allocation, if it were to be aligned with the game length in urban zones, it would “free up” 40-50 hours of ice time per week.

It is important to note that the areas surrounding the City of Edmonton, such as Leduc, St. Albert, Sherwood Park, and Fort Saskatchewan (bedroom communities of the city), have all been aligned with the urban zone standards of ice allocations (1.5 hours per game).

Condition

While a building condition assessment was not completed as part of this assignment, a general appreciation of the existing arena’s conditions was obtained and summarized as follows.

Genesis Place, being the newest arena facility (built in 2012) is generally in good condition, meeting many of the requirements of modern ice users and the public (in terms of accessibility). There was consensus among ice user groups that the size of dressing rooms in all arenas are small and storage is at a premium within all buildings, especially at Ron Ebbesen and Plainsmen. It was also noted that the Plainsmen Arena dressing rooms (2) were not suitable for female teams.

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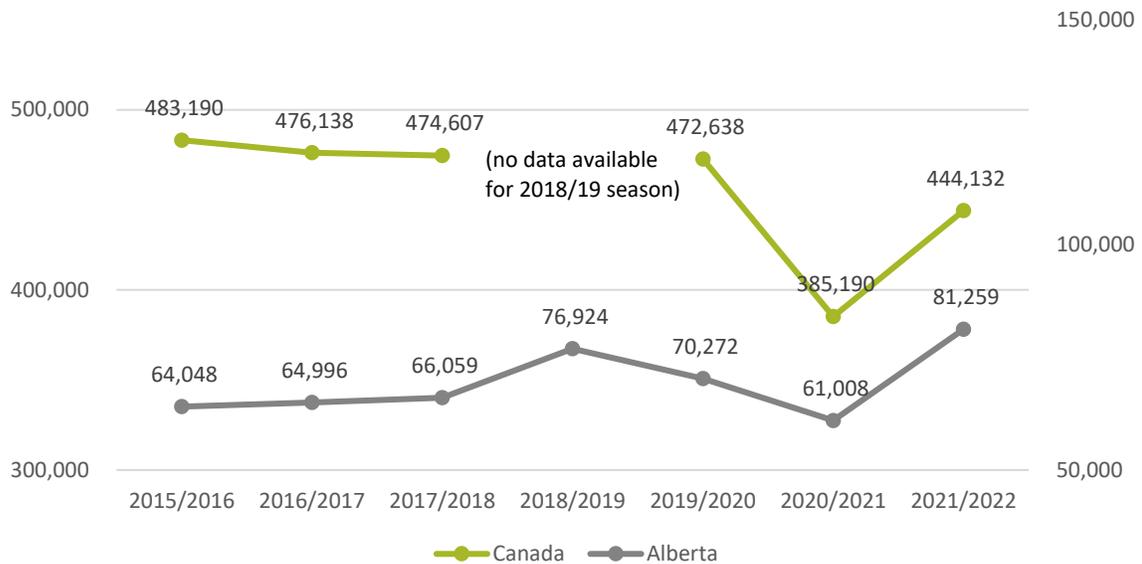
3.6 Trends in Participation for Ice Sports

Ice Hockey

Prior to the Pandemic, youth participation in ice hockey had been declining over the past decade across the country. Hockey Canada has generally seen declining youth registrations (ages 5 to 20) since the 2008/2009 season. Overall registrations across all age categories peaked in the 2014/2015 season in Canada but have been declining since then.

In Alberta however, youth hockey registrations have remained strong and continue to grow. The 2021/22 season saw record numbers of youth registrants in hockey programs with over 81,000 registered in the province.

Youth Registrations in Ice Hockey (Age 5 to 20), 2015/16 to 2021/22



Source: SPM based on Hockey Alberta and Hockey Canada Annual Reports

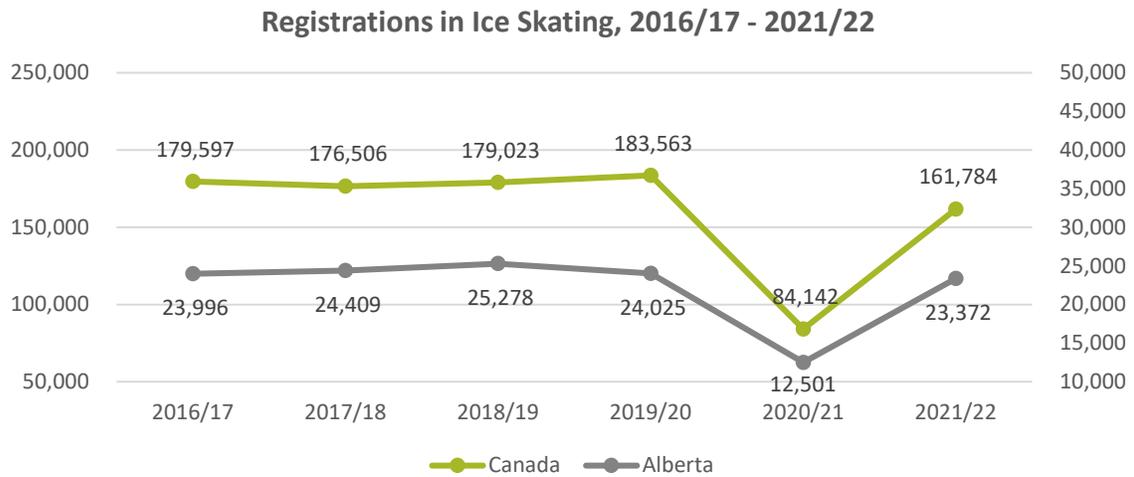
Based on discussions with the Airdrie Minor Hockey Association (AMHA) registrations have remained strong with significant growth over the past 10 years. The AMHA predicts they will continue to see strong growth over the next 5 years, with demand reaching over 1,750 players. The AMHA currently has 1,517 players and noted that this season saw 39 Airdrie residents being turned away due to a lack of access to adequate ice time.

Additionally, the sport of hockey is diversifying. Hockey Alberta has targets to increase programming targeted for equity, diversity, and inclusion (EDI). This will translate into more low commitment or learn to play leagues, more female leagues, and more open barrier leagues. Increasing community involvement and community investment is another priority and making hockey something that brings the community together than being a thing to do. In this regard, the AHMA notes that they have a lot of players in the mixed divisions, while actual female teams

seem to fluctuate in their membership more. Additionally, opportunities for expanding the elite female hockey program in Airdrie would be supported by the AMHA.

Ice Skating

Since 2016, total registrations in figure skating have remained steady on both a national and provincial basis. On a national basis, the 2021/22 season saw over 21,000 (13%) fewer registrants than there were in the 2019/20 season (pre-Pandemic). Alberta has seen a very strong bounce-back in ice skating registrations since the Pandemic, nearly reaching pre-Pandemic levels in 2021/22 with only 653 (3%) fewer registrants than pre-Pandemic.

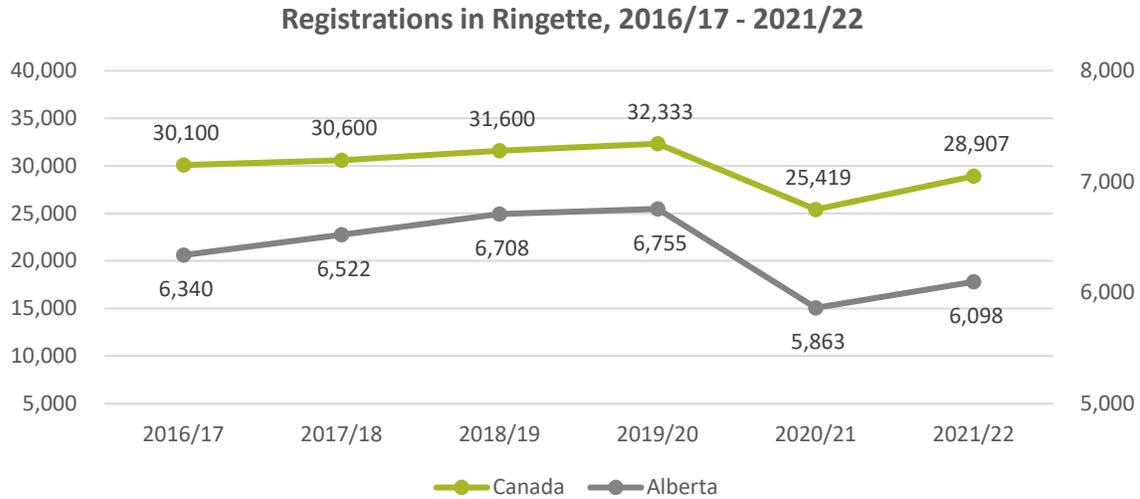


Source: SPM based on Skate Alberta and Skate Canada Annual Reports

Based on discussions with the Airdrie Skate Club, they have experienced a decrease in registrations. The Club once had around 1,200 members (pre-COVID), and now has nearly 800 members. This decrease is attributed to several factors, including but not limited to members getting scouted for other clubs, and a shortage of coaches which puts limits on the number of registrations that can be accommodated.

Ringette

Ringette has been gaining popularity across the country in recent years, with registrations in the sport steadily increasing between 2016/17 to 2019/20. It is played in all 10 provinces and the Northwest Territories, with a strong player base in Alberta – with provincial registrations accounting for 21% of the total registrants nationally.



Source: SPM based on Ringette Alberta and Ringette Canada Annual Reports

Discussions with the Airdrie Ringette Association indicated that this upward trend is also occurring locally, with the group gaining 22 participants this season. It was noted that they were unable to accommodate all those that were interested – having to place some prospective players on a waitlist and turn others away entirely.

3.7 Alternative Perspectives on Appropriate Level of Service

Long Term Athlete Development Model

The City’s Indoor Recreation Facilities Rental Allocation Policy for Sport User Groups (Policy No. P-COM-64-C, approved February 7, 2022) is intended to “ensure a fair, transparent and equitable allocation process for recreation facilities and amenities.” The policy notes that the City of Airdrie upholds the Long-Term Athlete Development (LTAD) model developed by the Canadian Sport for Life Society.

The City strives to align with the LTAD model to deliver and host sporting and active-living programming in municipally owned recreation facilities. In this regard, base allocations for Affiliated Sport Providers are calculated by the registration trends combined with the sport’s governing bodies recommendations for weekly time allocations aligned with the appropriate LTAD stages.

Calculations of the minimum and maximum hours recommended by the LTAD (and mean as a product of these figures) are on a per team basis for hockey, while ringette and skating are based on the number of registrants, age categories, and other considerations.

Based on the existing allocations for Affiliated Sport Providers, on average the City can provide around half of the minimum recommended hours for Hockey (49%) and Ringette (52%), while skating is able to secure around 35% of the hours recommended by the LTAD model.

Exhibit 18: LTAD Recommended and Actual Allocated Hours per Week for Affiliated Sport Providers

Sport	LTAD Recommended Hours/Week		Allocated Hours/Week	% of LTAD Min.
	Min.	Max.		
Hockey (per team)	276	295	134	49%
Ringette	484	1073	250	52%
Skating	533	1152	187	35%

Source: SPM based on data provided by the City of Airdrie.

The City makes every effort to meet the suggested allocations, however it is not always possible to do. Discussions with user groups indicated that each of the primary ice user groups use the maximum amount of available ice during prime time hours that they get allocated.

Participation-Based Standards

Understanding appropriate service levels is often assessed on a participation basis when data is available. In Airdrie there are three major sanctioned/affiliated² ice user groups (as identified below) and several additional groups that utilize the ice pads that are non-sanctioned.

As required as part of the Allocation Policy, participation data for the ice pads has been provided by the three sanctioned user groups indicating a total of 2,538 registered participants. Participants in these groups are all minors.

Sanctioned Group	2023 Registered Participants
Airdrie Minor Hockey Association	1,517
Airdrie Skate Club	763
Airdrie Ringette Association	258
TOTAL	2,538

Source: SPM based on data provided by the City of Airdrie.

Based on the above, the City is currently supplying one ice pad per 508 registered minor participants. A comparable standard of is often in the range of 1 pad per 400 to 500 registered participants when considering minor participants.

The City should continue to require the receipt of registration numbers of the sanctioned groups as per the Allocation Policy and should request this information from the other various groups that book ice time at the City’s arenas.

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² Affiliated Sport Provider is defined by the City (in Policy P-COM-64-C) as an Airdrie based group sanctioned by the sport’s Provincial or National governing body which provides organized sport and/or league activities.

3.8 Conclusions on Existing Indoor Ice Needs

The position that the City of Airdrie takes with respect to the sufficiency of existing supply of community ice available to City residents is a central plank in any strategy for future ice sheet development. It is also critical to the arguments in favour or against the development of a spectator event capacity within one of the arenas developed as part of the Southwest Recreation Facility.

The key metrics which should inform the policy position of the City include the following:

- ✓ Utilization of prime-time ice in the City: 95% - very high, essentially with a frictional vacancy rate only and which is necessary to effectively operate the allocation model and responsiveness to late changes in demand.
- ✓ The population-based service standard: 1 indoor ice sheet per 16,000 Airdrie residents. This is an acceptable standard for a City of 80,000; it is less acceptable if the position is taken that the City is part and parcel of an essentially agricultural/rural trade area. However, the latter masks the fact that Airdrie is part of a larger region, and the true indoor ice service standard is higher than that calculated only in respect of the supply of ice in the City. We take the view, and it is backed up in a range of policy supports, that the supply of indoor ice is very often sub-regional or fully regional wherein there is an expectation of modest drive times to secure ice time.
- ✓ It can, of course, be debated as to whether travel to Irricana, Bieseker or other more distant communities is acceptable for purposes of calculating the service standard, the fact is, these venues are part of the supply considerations, at least for some teams and households. Accordingly, the service standard regionally is higher by an order of magnitude (See Section 4.0).
- ✓ At the more precise (in our view) level of measuring service standard through a focus on participation of ice users, the case is made that the existing supply of ice results in a generally acceptable standard but there are real pressures on the demand-supply equilibrium such that even modest population growth will render the standard unacceptable.
- ✓ The standard existing is 1 per 500 minor ice sport participants based on the 3 sanctioned minor groups: the AMHA, Figure Skating and Ringette. This is at the low end of the standard where we might see a reasonable standard as 1 sheet per 450 minor users. Of course, there are other users including adults for which we do not have registrations. Suffice to say that should these additional users take the standard north of 1 sheet per 700 users, this would represent a system under some degree of strain.
- ✓ Regarding the LTAD model as a basis for generating demand expressed as need, we recognize the value of this approach and the attention that it focuses on development of minors in particular. However, as a basis for addressing infrastructure development and service standards, this approach, not surprisingly, generates unattainable allocations of time based on the existing model applied to Airdrie in ice sports. The City

has only 50% of the ice surfaces that it CURRENTLY needs. That is not a tenable position from which to plan for future infrastructure which will need to address the strong growth in the community.

Our position from a strategic lens is to:

- Recognize the strain in the system as regards allocations across the board including the inability of some unsanctioned groups to obtain ice time;
- Similarly recognize that access to facilities in the City of Calgary is sufficiently limited that the Cities of Airdrie and Calgary operate different arena markets. We also understand that Calgary residents are not a high proportion of facility users in Airdrie;
- Acknowledge that the system is regional in nature north of the City; and
- **On balance, the existing service standards are reasonable as a basis for concluding that there is sufficient supply to meet existing demand.**

The latter point takes into account the following strategic considerations:

- the allocation of game time (as high as 2.5 hours for some age groups) is representative of a rural service standard for access to play. The standard in many urban settings is substantially lower. Change this standard, and greater capacity exists to absorb unmet demand. Note that this kind of change is something that must be agreed to by the entire league circuit and endorsed by the Provincial Sport Organization (Hockey Alberta for example in the case of hockey).
- Linked to this, as Airdrie urbanizes, it should be the case that the level of service in overall access to ice time beings to reflect more of an urban scale than a rural service standard. This means, in simple terms, a higher ratio of population per ice sheet. The current ratio – reasonably concluded as somewhere between 1 sheet per 16,000 population and 1 sheet per 18,000 – should likely gradually increase over the coming decades, resulting in a nominal lowering of the standard.
- Of course, if the current approach in forward planning results in a reasonable amount and pace of public investment in new facilities, it is arguable that a pragmatic approach improves the service standard – buildings get funded and built, expectations are met, and level of building amenities are improved.
- In this way, the real service standard rests in whether high quality buildings, more capable than their historic counterparts to serve a greater number of people, are developed. And if they are developed alongside other recreation and community services, the development of rinks is part of a broader improvement in overall recreation service standards.

By concluding that the City's ice supply is currently meeting most needs based on the existing population, and in a regional context, the focus should be on meeting the supply needs of the rapidly growing population.

This, we believe, is the more important point – how and when to meet demand arising from growth. With various solutions in mind, it is important that the timing of this development align with the growth in demand – build too late and there will be a pressurization of the existing supply-demand balance while building in the short term would be an ideal way to absorb growth and enable more flexibility in the existing system to meet existing needs.

Our conclusions therefore focus squarely on the question of when to build. The following Section provides an indication of the ice supply deficit by 10-year time periods. This provides a checklist against which progress should be measured in planning for, funding and developing the rinks.

4 Projections of Future Indoor Ice Needs

Section 4 provides an indication of the ice supply deficit by 10-year time periods, which enable the City to continually assess the future ice requirements as it is planning for, funding and developing the rinks. The outcomes of this analysis conclude that considering the base population projections for the City, the need is 2 net new ice surfaces in service by 2035 and 3 to 4 by 2045. This is in line with the participation-based standards of provision. At a higher level of anticipated population growth in the City, a net need for 3 additional indoor ice surfaces (community use, NHL regulation size) by 2035. By 2045, net requirements are an additional 5 indoor ice surfaces over and above the 5 in operation at the City currently.

This section also addresses the recommended strategy for ice at the SW Recreation Facility and how this affects the City’s other arenas. This strategy is focused on developing a twin pad arena initially at this location and depending on the land available the potential to implement two-additional pads as an expansion over the long-term. Several considerations for site planning are also detailed.

As an existing facility, the Plainsmen Arena is important area to the overall ice supply in the City. Recent investment into this arena is a sunk cost, and small investment to maintain the facility in a state of good repair would keep it sustainable for another 20 years. Therefore, it should be maintained over this period, and could be decommissioned when the third multi-use facility is underway.

4.1 Demand-Supply Reconciliation

To maintain the existing standard of provision in the City over the next decade or so, under the base population scenario the city will require an additional two ice pads by 2035. This would increase to a need for at least 3 pads by 2045 and 5 or 6 pads by 2065.

Under a higher population growth scenario (alternate), the city will require an additional three ice pads by 2035. Looking to 2045 under this scenario, the city would require an additional 5 pads, increasing to the need for 8 ice pads by 2065.

Exhibit 19: Projected Population-Based Standard of Provision

	2023	2025	2035	2045	2065
City Population (Base)	80,649	84,528	109,574	134,111	168,468
Existing Standard	1 ice pad per 16,000 population				
Municipal Needs	5.0	5.3	6.8	8.4	10.5
Existing Supply	5.0	5.0	5.0	5.0	5.0
Surplus (Deficit)	-	(0.3)	(1.8)	(3.4)	(5.5)

	2023	2025	2035	2045	2065
City Population (Alternate)	80,649	92,769	127,307	165,534	211,112
Existing Standard	1 ice pad per 16,000 population				
Municipal Needs	5.0	5.8	8.0	10.3	13.2
Existing Supply	5.0	5.0	5.0	5.0	5.0
Surplus (Deficit)	-	(0.8)	(3.0)	(5.3)	(8.2)

It should be noted that the Indoor and Outdoor Recreation Needs Assessment (2022) suggested that the City of Airdrie should aim for a standard of 1 ice pad per 10,000 residents. This increase in service would result in the need for a significant number of new ice pads to be built in the City to reach this high standard of provision (6 additional ice pads by 2035 and 12 ice pads by 2065). As the City grows and becomes increasingly urbanized, it could be argued that the standard should decrease over time to reflect a more urban standard of provision.

From a broader perspective, if the goal is to maintain the existing level of service at the regional level (1:18,000 population), 2 ice pads would be required within the region over the next ten years.

Exhibit 20: Regional Population-Based Standard of Provision

Arena Provision	2022	2032
Estimated Regional Population	129,705	159,324
Existing Standard	1 ice pad per 18,500 population	
Regional Needs	7.0	8.6
Existing Supply	7.0	7.0
Surplus (Deficit)	-	(1.6)

Source: Regional Population estimates obtained from ESRI Business Analyst, 2023.

As it relates to participation-based standards, going forward, the number of registered minor participants has been estimated based on the existing share of the population that registers for these activities. If the proportion of the population that registers for sanctioned activities remains stable, there will be a need for two ice pads by 2035 and at least 5 ice pads by 2065. If a higher standard were to be used (1 ice pad per 400 registered minor participants) the City would require 8 ice pads by 2065.

It is noted that under the LTAD model the City collects registration data from the sanctioned sports groups. The City should continue to monitor registration numbers to help assess the future needs of these groups.

Exhibit 21: Participation-Based Standard of Provision

Arena Provision	2023	2025	2035	2045	2065
Registered Minor Participants	2,538	2,660	3,448	4,220	5,302
Existing Standard	1 ice pad per 500 registered minor participants				
Municipal Needs	5.0	5.3	6.9	8.4	10.6
Existing Supply	5.0	5.0	5.0	5.0	5.0
Surplus (Deficit)	-	(0.3)	(1.9)	(3.4)	(5.6)

4.2 Alternative Implementation Strategies

The outcome in numeric terms based on the application of standards is the following:

At the City Level

- At a higher level of anticipated population growth in the City, a net need for 3 additional indoor ice surfaces (community use, NHL regulation size) by 2035. By 2045, net requirements are an additional 5 indoor ice surfaces over and above the 5 in operation at the City currently.
- Using the more modest population projections, the need is 2 net new ice surfaces in service by 2035 and 3 to 4 by 2045. This is in line with the participation-based standards of provision.

At the Regional Trade Area Level

- To maintain the regional standard, 2 net additional indoor ice surfaces would be required by 2032, but there is a question as to whether communities other than the largest community (Airdrie) would be in a position to build.
- Certainly, there should be a discussion as to whether some of the needs identified could be supplied by other communities such that the City could assume that it is not building at its cost to service the whole region.
- With a reasonable assumption that the wider region could supply 1 net new ice surface over the next 10 to 12 years, this would enable the City to consider several different strategies to meet need, involving several sites potentially.

4.3 Recommended Strategy for the SW Facility and Subsequent Development

There are several factors to weigh in this consideration, beyond the arithmetic of net need arising from the application of population projections and service standards. These include:

- How many arenas can the SW Area site reasonably accommodate because of the constraints of site planning?
- Should the City concentrate all the arena development required to 2045 on one site (the SW site) or consider a distributed model which splits up demand between the SW facility and a subsequent recreation complex development elsewhere in the annexed lands over the longer term?
- What is the funding available at different points in time as the City will need to consider whether to build after demand has built up through growth (a lagging approach), build

in advance or in lockstep with population growth (a phased approach) or for reasons of efficiency build in a single phase to meet all ice needs until 2045?

In the absence of a site plan analysis to determine the sufficiency of land at the municipal reserve site, this report considers two approaches for the SW site:

- The development of a twin-rink complex to be operational as part of the first phase of development of the complex.
- The development of a 4-rink complex in a phased approach whereby two rinks are initiated as part of phase 1, and two additional rinks developed as an expansion to meet the needs expected by 2045.
- Development needs between 2045 and 2065 are essentially theoretical at this time, but notionally the extent of demand would underpin the core uses at a subsequent large format multi-use recreation centre built at the western fringe of the City (as shown in Exhibit 1).

4.4 A Strategy for the Plainsmen Arena

We understand that upon commissioning of a new multi-use centre replete with new indoor ice, the current plans for the Plainsmen Arena (which began life as an outdoor arena which was subsequently enclosed), are to decommission this arena.

In our view, any plans to reduce the amount of community ice available should include an assessment of an interim strategy to maintain existing facilities as a means to improve the flexibility in investment decision-making regarding new ice surfaces. This logic may well apply to the Plainsmen arena where, with a consensus required, it could be sustained as the sunk investment that it is and reduce the extent of the initial capital outlay for new rinks.

By way of example, if the higher population forecasts are materialized, by 2035 a total of 3 net new rinks are required by 2035. The removal of the Plainsmen would immediately require plans for the SW facility to develop a four-pad complex unless these were either split up into 2 twin rink complexes or perhaps even a four-pad owned and/or operated by a third party.

Maintaining the Plainsmen Arena does not necessarily remove the need for building new rinks at considerable scale as part of the Southwest Recreation Facility plans, but it does improve the range of options to phase development.

A later section addresses the impact of operating one rink that is co-designated as an large capacity arena in terms of meeting the baseline community ice needs. However, the analysis of increased spectator capacity opportunities later in this report will demonstrate how community use of that facility can be retained to a significant degree. Maintaining the Plainsmen Arena will also provide greater flexibility in planning for one of the new rinks to operate with emphasis on spectator events.

4.5 Site Planning Considerations

We recognize that the City’s existing multi-use recreation centre (Genesis Place) is somewhat tight as a land holding, with a degree of parking constraints at certain times of the day.

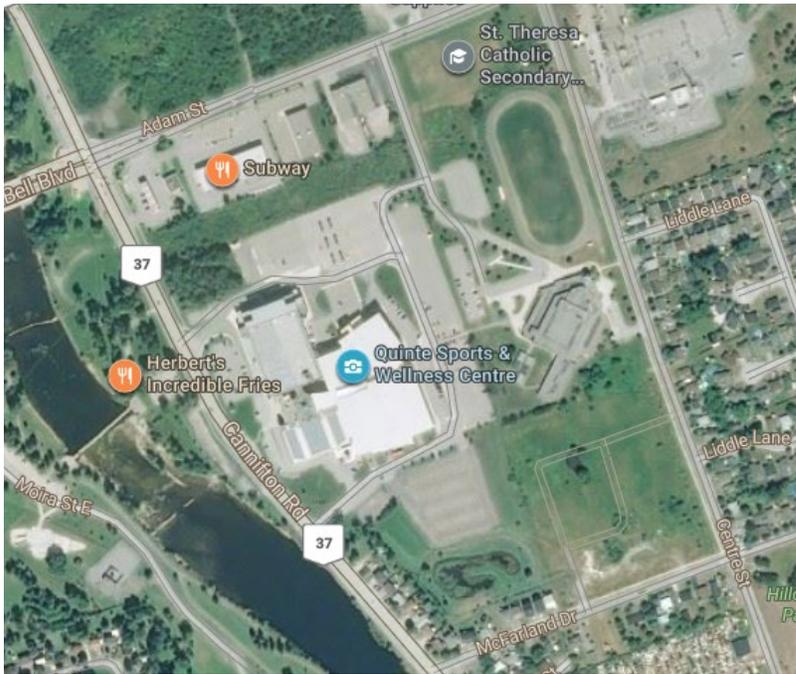
Below, the Invista Centre in the Gardiners Road Business Park in Kingston, Ontario is located on a site of approximately 10.5 ha. (26 acres) +/- with good site configuration (width and depth). The 180,000 sq. ft. centre includes four (4) NHL sized indoor ice sheets, a dry mini rink, four (4) multi-purpose rooms, a fitness centre, concession, pro shop, and Sports Hall of Fame. The site also houses a full-sized football field (artificial turf) and track facility (CaraCo Home Field), as well as a natural turf soccer field to the south.

Exhibit 22: Invista Centre, Kingston, ON



The Quinte Sport and Wellness Centre and CAA Arena in Belleville, Ontario, is located on a site of approximately 8 to 10 ha (20 to 25 acres). The facility features 330,000 sq. ft. of community recreation space. Phase 1 of a two-phase expansion was completed in 2012 with the addition of a major indoor aquatics complex, gymnasium, and additional rinks. The facility now has four (4) NHL-sized rinks including one of which is the City’s multi-use sport and event centre.

Exhibit 23: Quinte Sport and Wellness Centre and CAA Arena, Belleville, ON



The outcome of these examples, albeit from Ontario, is that there is a question to be addressed in the site planning stage of the project to determine:

- If there is sufficient land availability to meet the objectives of accommodating all three (3) phases of development on the site given the priority given to the land need requirements of the school.
- Should the location be utilized to house all or only some of the arena pads needed by the City over the period to 2046 or would it be preferable to build at lower scale and thereby reduce the development gross floor area required to be accommodated on the site. This of course may have beneficial implications for parking and other amenities on site as well as the capacity for in-situ future expansion.
- If land availability is determined to be constrained what implications does this have for the development of a spectator facility capacity as part of the recreation complex?

5 The Opportunity to Capture the Spectator Market

This section presents important definitional distinctions between the various types of buildings referenced in this report, specifically arenas, including large capacity arenas with seats, and event centres. Several examples of community arenas that include a large capacity arena with seats are provided, detailing the functionality of each within their respective contexts.

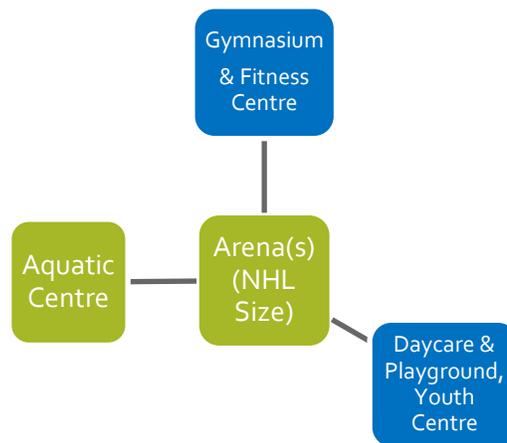
The profile of the potential spectator market is detailed here in terms of geographic extent (30 minutes drive time, excluding Calgary), and demography (population growth, age profile, income, and recreation spending).

5.1 Definitions and Terminology

This report addresses the need for community ice developed as part of the Southwest Recreation Facility. Those requirements are laid out in Section 4.0. This report also addresses the opportunity for an event functionality of the Southwest Recreation Facility. To many people these two functions would seem incongruous based on their perceptions of event centres, entertainment centres and community recreation centres. It is therefore useful to provide some definitions and characterize these different types of buildings, spaces, services, and markets.

Multi-Use Community Recreation Complex

Multi-Use Community Recreation Complexes can be quite varied in the types of use, scale, operational requirements, and financial implications (one typical example below). However, in essence they are the combination of certain core services (for example, aquatics, library, or ice rinks) and the development of other non-core (but intrinsically important) services that can add significant value to the community. This represents exactly what the Southwest Recreation Facility is intended to be, and what Genesis Place is currently.



These buildings can and do have event functionality built into them. Most do not, but what defines an event centre is key to that observation.

Multi-Use Sport and Event Centre

This report gives considerable attention to the demonstration of what this building type is, primarily in the context of the medium scale facilities (5,000 to 10,000 fixed seat) range in mid-sized cities in Canada. In summary, these are facilities with an ice surface (or surfaces), a large number of seats and the capacity to host a very wide arrange of sport, entertainment, cultural, community, trade show and other commercial events. They can be configured to operate as a large spectator arena one evening, a dry floor court stadium the next, and have the ability to expand the floor areas by retracting seats. They are capable of hosting major entertainment events; televised events; and the design of the building enables full and effective televising. The floor to ceiling heights, catering, offices, change rooms, and other amenities are focused on the events market and serving the needs of primary tenants such as spectator hockey teams (WHL, OHL, QMJHL, etc.)

Based on this characterization, these buildings are far more versatile than arenas, whether the latter are basic community arenas or large capacity arenas with seats (for example 1,500 to 2,500 fixed seats).

Arenas

The report references arenas and “large capacity arenas with seats”. Arenas are of course the typical community ice venues for minor and adult ice sports. Many are dated, some are new and have a range of technological innovations that improve services. Modern arenas are bigger than their older predecessors, often built as complexes of 2, 3 or 4 (or more) rinks depending on the market context and often with a range of services provided. Their essence is community participatory use.

Floor to ceiling heights, overall scale, number of change rooms and amenity spaces are all tailored to their context and role in the community.

There are many community, varsity and other arenas that also have significant seating. This report provides a snapshot of such venues in Canada. We generally limit the categorization of arenas to those which have an upper limit of fixed seats between 2000 and 3000 seats, beyond which it is likely that their function is more focused on spectator events.

Arenas can indeed be distinguished from event centres not only by the seat count but by the emphasis on users – many event centres are heavily focused on commercial events, some exclusively so, while arenas will have predominantly community use (varsity, intramural or other use in the College and University context). Arenas will hold events, some spectator events that fill the seats, others are flat-floor participatory events (trade shows, flea markets and other community uses).

These distinctions are important in the context of the balance of this report. The following section describe in greater detail the distinctions made above and provide visual examples of each building type.

5.2 Understanding Arenas versus Event Centres

Arena Facilities

Community Arenas

Arenas are typically built today as twin- or multi-pad facilities with limited seating for each rink (e.g., 500 seats), necessary dressing rooms including all requirements for gender specific change rooms, accessibility, and other specifications; additional break-out rooms and concession opportunities consistent with a community-focused facility. The existing ice pads at Genesis Place in Airdrie are an example of a traditional twin-pad arena venue.



Example of a Community Arena

Large Capacity Arenas with Seats

There are some arena facilities that have an expanded spectator seating capacity for one of the rinks within a community arena complex (with an upper limit of 2,000 to 3,000 seats). This is still a community rink, but can accommodate a broader range of tournaments, special events and other hosting requirements. Facilities of this nature often include additional break-out rooms and function suites, and expanded concession opportunities throughout the building.



Example of a Large Capacity Arena with Seats Capacity

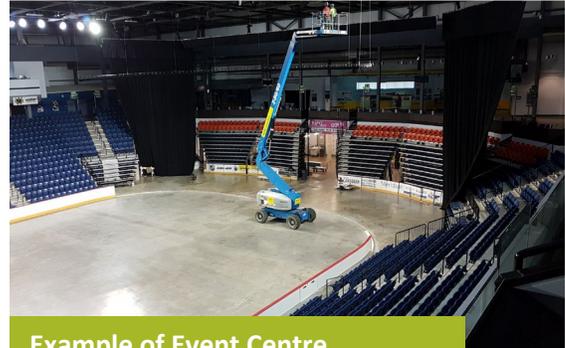
Arena facilities differ significantly from an event centre in a number of ways, which limits their ability to host the variety and complexity of events that are possible within a proper event centre. This includes, but is not limited to:

- Lower floor to bottom of truss height without extra rigging grids making it difficult to host major concerts or events requiring overhead connectivity for speakers and lighting.
- No retractable seating along the side runways and end zones which limits the amount of floor space available.
- Lack of “floor power” for concert equipment and television production.
- Lack of a catering kitchen which eliminates the hosting of large banquets or gatherings that require on-site catering services.

- Limited “back of house” storage areas normally included in event centre models to accommodate a variety of multi-use components, such as banquet tables, conference chairs, conference pipe and draping, basketball flooring, etc.

Event Centre

Differing significantly from a community arena, an event centre can be within a single or multi-pad facility. These facilities typically include full event centre and hosting infrastructure, all necessary functional requirements of both a sports and entertainment venue, with the potential for additional uses to be included in the design. This often includes media spaces, designated tenant team dressing rooms, private boxes, retractable seating, high floor to ceiling heights, etc.



Example of Event Centre

There are several components that form part of a typical event centre which are not found within arena facilities even if that arena has expanded (large capacity) spectator seating. This includes, but is not limited to:

- Retractable / removable seating enables a larger flat floor area for event hosting and loading, providing opportunities to host a wide variety of events that may not typically be held in ice facilities.
- An open roof structure capable of accommodating show loads, which can be in the 50,000 – 75,000 lb. range for speaker/lighting loads, which need to be easily and quickly suspended from the underside (typically) of the roof structure. Access to the structure through catwalks is critical for show setup and general management of the lighting for the building. These high ceiling heights also provide additional flexibility for a variety of events.
- Retractable jumbotron allows for clear ceiling heights for various flat floor events and somewhat changes the ambiance of being in an ice facility.
- Appropriate power distribution throughout the building. Critical areas of power concentration include the back of house for concerts and end-stage events, the bowl corners (used for even distribution of power for trade shows and other floor type events), catwalk level (from spots and special lighting), and shore power (easily accessed for use by show-oriented vehicles including television broadcasting support).
- All equipment and furnishings necessary for event-hosting should be stored on site, therefore consideration for accessible storage is important. This includes rink boards and glass (stored separately), flat floor seating, tables, portable stage, ice covering, and other equipment as necessary.
- Ancillary spaces (i.e. viewing decks, club lounge, entrance halls, etc.) that act as complementary spaces to the activities that occur in the bowl as part of a larger event.

Exhibit 24: Core Differences Between Arena Models and Event Centre Model

	COMMUNITY ARENA MODEL	LARGE CAPACITY ARENA MODEL	EVENT CENTRE MODEL
INCLUSIONS	<ul style="list-style-type: none"> Multiple pads (no justification in Airdrie for single pad complex) Seating – 200 -250 seats maximum, configurable in different ways depending on design 1 meeting room per 2 rinks Parking (+/- 100 spaces per rink) 	<ul style="list-style-type: none"> Floor to ceiling height still typical of an arena 1,500- 3,000 fixed seats configured ideally in a bowl Additional scale to meeting room (100 person capacity minimum) Parking – sufficient to meet an average demand expected 	<ul style="list-style-type: none"> This model is ILLUSTRATIVE – and assumes that the market for a primary tenant of significance justifies the seat count Event Centre scaled for multi-purpose uses – floor to ceiling height significantly higher 4,000+ seats with proportion retractable seats Concert capacity with roof truss loading capacity for rigging Show power and stage set-up capacity Full consideration of storage and loading capacity While Boxes are traditional, open concept hosting space (equivalent function to corporate boxes) required Parking and site access: anticipates peak demand Site should maximize potential for incremental destination development (real estate development of commercial uses in support of the event centre)
DETAILS	<ul style="list-style-type: none"> NHL regulation ice surface 250 seat capacity in each rink Small meeting room/warm up room Snack bar/concession – as part of the overall multi-use community centre footprint Skate rental space and skate sharpening Administration office Zamboni combined; storage 	<ul style="list-style-type: none"> NHL regulation ice surface (only use Olympic if mechanicals + infrastructure in place to operate as NHL scale too (comes at a cost in capital and operational terms and first row of seating is pushed back). Main arena maximum floor space 85’ x 200’ if developed at NHL rink. 2,500 fixed seating bowl/3,600 capacity with floor seating 2 meeting rooms with capacity to open into 1 large space (minimum 	<ul style="list-style-type: none"> NHL regulation ice surface Main event centre maximum floor space 110’ x 240’ (retractable seats) 4,000 fixed seating bowl/5500 capacity with floor seating 4 concession points (fixed) in event bowl Areas available in concourses for food and beverage carts/kiosks Catering kitchen for large gatherings in event centre Potentially an ancillary auditorium for hosting (helps with major national event bids)

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	COMMUNITY ARENA MODEL	LARGE CAPACITY ARENA MODEL	EVENT CENTRE MODEL
	<p>for glass, snow removal equipment, etc.</p> <ul style="list-style-type: none"> • 6 dressing rooms per pad + consideration of best practice for gender equity needs per change rooms • 2 referee/officials dressing rooms • Men’s/ladies’ washroom (one each) • Sound room (figure skating) - Include as part of timebox area 	<p>100 persons and ideally larger)</p> <ul style="list-style-type: none"> • concession in main concourse of the community centre as a community amenity – use mobile points of sale within event bowl • 6 dressing rooms (plus one scaled to accommodate future AJHL or other visiting team) • 2 referee rooms/flex rooms • No Box office • Option for future AJHL team – an additional large team room to include dressing room, player lounge, coach’s office, training area, equipment and laundry room and storage area. • 4 sided and center hung scoreboard with video display and sponsorship panels • Administration offices • Multiple restrooms (4) in main arena • Larger back of house workshop and storage areas than twin pad • Greater number of parking spaces but remains a compromise based on likely range of spectator events and overall needs of the community centre 	<ul style="list-style-type: none"> • 6 dressing rooms scaled accordingly + assumed home team dedicated spaces (dressing room, player lounge, coach’s office, training area, equipment and laundry room and storage area • 2 Star/Green rooms/flex space • Staging and storage expanded space at back of house • Rigging, lighting and power for performance events • High performance training centre potential – as a use of second floor space • Equivalent of corporate suites in some design form that meets market needs (likely 15 + suite equivalents if scaled as a true sport and event centre)) • Loge boxes and club seats – depends on scale of play (AJHL, WHL, etc.) • Premium seat level lounge and exterior balcony • Expanded audio/visual displays and sponsorship panels (advertising) • Box office (debatable in the modern era/ alternative is smaller client service space as part of admin) • Administrative offices • Team store (optional) • Team Offices (optional) • Sufficient parking spaces to enable event centre to operate at its maximum potential; extent of on-site parking required is a function of the surrounding land use mix and availability of on-street and other off-street (commercial parking)

5.3 Existing Metrics of Scale and Event Centre Functions Among Comparable Communities

The following provides examples for comparative purposes of arenas that are associated with various Alberta Junior Hockey League (AJHL) teams. Information includes the scale of the facility, its fixed seating capacity, range of events and relevant details of shared community use.

In addition, we also provide a broader assessment of other venues in Canada that accommodate between 2,000 and 3,000 fixed seats (excluding the flat floor of the ice slab). The purpose of this assessment is to document the amenities and functionality that define these facilities and establish whether they are accurately described as arenas or event centres.

The distinction is important for several reasons:

1. Based on our review of the facilities in mid-sized cities – ranging from their design, minimum scale, minimum fixed seating count and operational mandate which can also include private (third party) management of the facility on behalf of its municipal owner – these venues are differentiated from arenas by an order of magnitude. These distinctions are referenced earlier in this report.
2. Event centres generally have a fixed seating count of 3,500 as a minimum. Most of the modern facilities built in Canada in recent years are in the 4,500 to 5,500 fixed seat range and higher. Facilities that have a seat count in the 2,000 to 2,999 range are, in our view, best described as large capacity arenas. They can host a range of events and can operate as multi-use centres, but their mandate may not be centrally one of commercial operations. In some cases, they were initially built as community-oriented venues for minor sports but with expansion, have taken on more relevance to the event market. The events market itself has grown over time, providing a greater range of opportunities for smaller venues to participate.
3. It is apparent that the smaller venues (those with less than 3,000 seats) operate based on sharing a mandate to provide community sports access, promote sports tourism and contribute to other opportunities for entertainment events, economic development and tourism. This broader role usually translates into a reduced number of amenities in the building – they have the attributes of an arena more than the capabilities of a multi-use sport and event centre – and fewer spectator events beyond the primary tenant sports team.
4. A facility built as part of the Southwest Recreation Facility would likely fall into this category of being an arena which has good and ample capacity to host spectator events of a type, frequency and duration that is commensurate with its role as part of a community recreation complex. This does not mean that there is no opportunity for commercial development to take advantage of what would be considered a large capacity arena with seats, and a number of examples exist where this has happened. The Dow Centennial Centre in Fort Saskatchewan as one such example. However, the site is likely not sufficient and commercial development would need to occur on

available land nearby. More likely, given the location of several hotels and hotel-related conference and meeting room capabilities south of the City, is that the operation of the Southwest Recreation Facility would lend itself to a community centre model that enables event hosting and spectator events, but it not operated with a mandate of being a commercial event centre.

Exhibit 25: Review of Select AJHL Arenas in Alberta

Location	Facility	Features	Seating Capacity	Age (years)	Box Seating	Total Events	Total Event Days	Other Details
Grand Prairie	Revolution Place	<ul style="list-style-type: none"> 17,000 square foot ice surface 18,000 square foot exhibit space for events and banquets 6 dressing rooms and officials quarters 3 meeting rooms Media room Box office Warm-up area 3 hospitality rooms Concession 	For Hockey: 2,975 seats For Concerts: 4,600 seats	29 (built in 1994)	No	64	113	Multi-purpose arena originally built for the 1995 Canada Games. Home to the Grand Prairie Storms.
Okotoks	Pason Centennial Arena	<ul style="list-style-type: none"> Single pad arena Rink surrounded by full 2-lane walking/running track Concession 	1,500 seats (standing room capacity for another 5000)	17 (built in 2006)	No	35 AJHL tournaments	36 AJHL tournament days	Year-round multi-use facility. Home of the Okotoks Oilers.
Sherwood Park	Sherwood Park Arena	<ul style="list-style-type: none"> 2 NHL ice pads 8 dressing rooms 2 meeting rooms Officials' room First aid room Media room Coach/player interview area Concession 	For hockey: 2,000 seats (main rink) Other rink: 600 seats	29 (built in 1994)	No	28 AJHL tournaments	29 AJHL tournament days	Used for hockey, ringette, figure skating, lacrosse, banquets, and other special events. Home of the Sherwood Park Crusaders.

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Location	Facility	Features	Seating Capacity	Age (years)	Box Seating	Total Events	Total Event Days	Other Details
Calgary	Max Bell Centre	<ul style="list-style-type: none"> • 2 ice pads • Press box with broadcast accommodation • 4 scoreboards with flexible scoring • Stadium speaker system • 3 meeting rooms • 18,000 sq. ft. exhibit space (trade shows) • 8 multi-use dressing rooms • Event office • Accessible ground floor • First aid room 	For hockey: 2,121 seats (3,000 with standing room)	2006 Reno (2nd Ice) 2022 \$14M Renovation	No	Unknown	Unknown	Home of the Calgary Canucks (AJHL) and the Northeast Calgary Athletic Association's minor hockey teams. The arena also hosts Rocky Mountain Lacrosse League games and was the 1988 Olympic host for curling and speed skating event.
Calgary	Father David Bower Olympic Arena	<ul style="list-style-type: none"> • 2 ice surfaces (200x100 and 185x85) • Adjacent to the Foothills Aquatic Centre, Athletic Park and Foothills Track 	Seating Capacity: 1,750 (2,000 with Standing)	60 (built in 1963)	No	Unknown	Unknown	Home of the Calgary Mustangs (AJHL) and for the Calgary Dinos (Varsity Hockey). Arena is also used by the WHL and the AAA Minor Hockey. The facility is also used for training by the National and Olympic Figure Skating.

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Events Review: Large Capacity Arenas with Seats

Initial desk-based research was conducted, looking into events held at indoor sports facilities across Canada with between 2,000 and 2,999 fixed seats (per a large capacity arena with seats). The purpose of the research has been to (a) ascertain how many of these venues hold special events, and if so what type and how regularly; and (b) gauge whether facilities of this size in Canada generally operate as arenas or as commercial event centres. The detailed results of this research are provided as Appendix A.

A total of 35 indoor sports facilities within this seating capacity range were identified with the only selection criterion was that seating capacity be based on fixed seats for hockey. No arenas were excluded due to their location in Canada or their date of construction. In summary, most of the facilities researched operate as arenas serving their principal local sporting tenant(s), and in most cases, additional special events hosted at these venues are 'flat floor', do not take place regularly, and typically are focused on local community (as opposed to unique or tour circuit events which have a wider draw). A lack of online information advertising past or forthcoming special events for these facilities would support the belief that, generally, arenas of this size do not normally operate as commercial event centres.

Moreover, where arenas of this size are located in urban areas, our research has indicated that there are often larger or purpose-built alternative venues locally which are better placed, by virtue of their size and/or their facilities, to attract a wide variety of special events (e.g., theatres, auditoriums, conference facilities).

We have looked at two large seating capacity arenas in Alberta and can offer the following regarding the type of events hosted at the facilities in Camrose and Brooks, Alberta.

Camrose Recreation Centre (EnCana Arena): The EnCana Arena is the largest of three arenas in this recreation complex and has 2,500 fixed seats. Arena events are principally the Kodiaks hockey games. Concerts and other performances are generally hosted in other purpose-built venues in Camrose, including the Bailey Theatre. This arena therefore does not operate as an event centre.

Photo: Camrose Kodiaks.
<https://www.camrosekodiaks.ca>



Centennial Regional Arena, Brooks: This has a fixed seating capacity below 2,000 (1,700 seats) but was included in the research as an additional regional comparator. This is also principally a hockey venue but has hosted occasional non-ice events. Although the venue is identified online as being suitable as a concert venue, it does not appear to regularly host any non-sporting special events, and therefore, like the EnCana Arena, does not operate as an event centre.



5.4 Characteristics of the Airdrie Spectator Events Trade Area

The following analysis provides the details of the market conditions within the patron market for events for a future arena in the City of Airdrie, including the size of the market population, demographic trends, and household spending on sport and live performance events.

The market area is defined as 30-minutes drive time from the Southwest Recreation Facility located at 800 East Lake Boulevard in the City of Airdrie. The market area for the future Airdrie arena located at the planned Southwest Recreation Facility spans a geographic area that totals 2,451 square kilometres, and comprises all or portions of the following jurisdictions:

- Airdrie, Bieseker, Carstairs, and Irricana in Rocky View County; and
- Crossfield and Didsbury in Mountain View County.

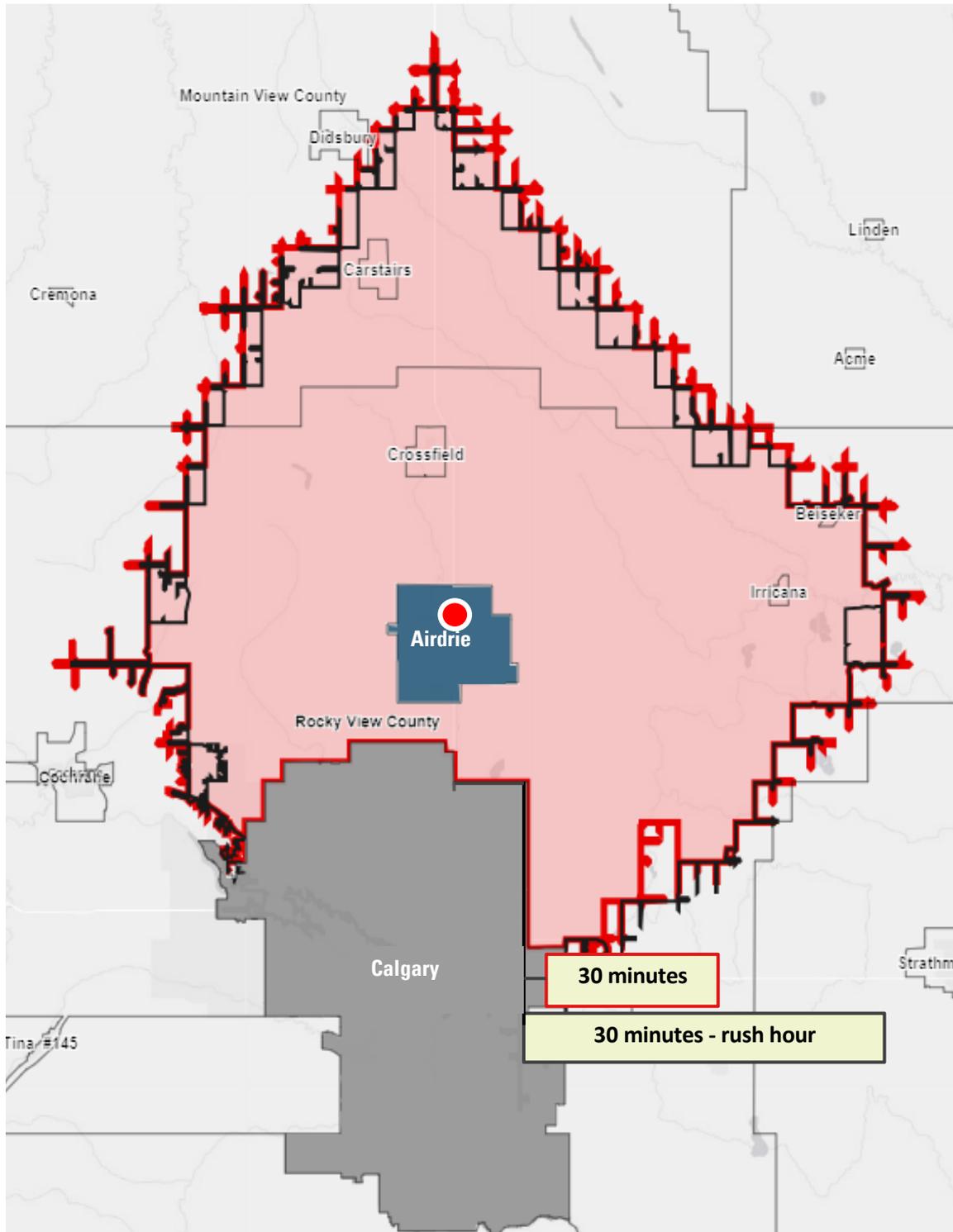
While the 30-minute drive area reaches the City of Calgary, this area is excluded from the analysis. The patron market for the future arena is defined to be households residing within the market area.

The exhibit below shows the Market Area for an average volume of traffic and for a higher volume of traffic (the latter is indicated as “30-minutes rush hour”). The two areas do not differ significantly.

The market assessment details potential markets and outcomes of hosting special events (concerts, championship showcases, etc.) within the prospective spectator bowl if built for a high-performance sport team.

The data included within this section, which is the basis for the analysis, is derived from two sources: 2021 Census, Statistics Canada Census and ESRI Business Analyst projection for 2022-2032 (accessed in October 2023). Sources are noted accordingly.

Exhibit 26: Market Area - 30 Minute Drive Time from the proposed SW Recreation Facility



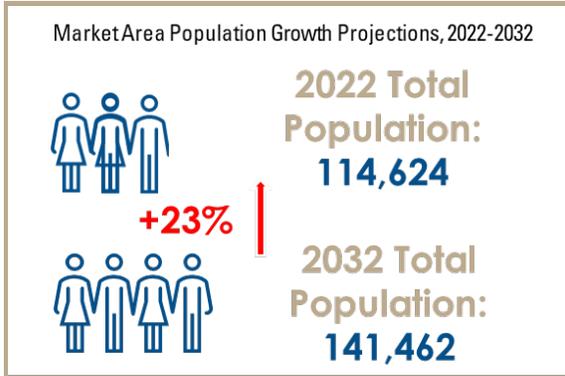
Source: SPM Based on ESRI Business Analyst data, 2023.

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Overall Market Area Profile

Population Growth

The market area has an existing population of nearly 115,000 people.



As shown below, 10-year population growth is estimated 23.4% percent in the Market Area and the City of Airdrie. Provincial population is projected to increase by almost 18%.

Exhibit 27: Population Growth Projections for the Market Area, Comparison

Site	2022 Total Population	2032 Total Population	Population 10-year change, %
Market Area (30 min)	114,624	141,462	23.4%
City of Airdrie	84,208	103,931	23.4%
Province of Alberta	4,530,938	5,328,171	17.6%

Source: SPM based on ESRI Business Analyst Population Projections. Accessed in October 2023.

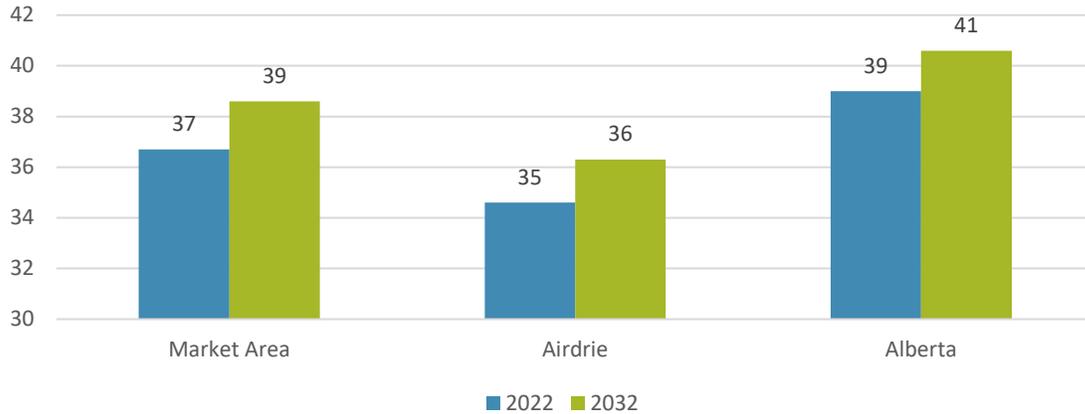
Age Profile

In general, the market area is characterized by a relatively older demographic compared to the City’s population and younger demographic compared to the province.

In 2022, the Market Area average age was estimated at 37 years, which was higher than the average age in the City of Airdrie (35 years) yet lower than in the province of Alberta’s (38 years).

By 2032, the median age of the market area population is expected to increase by 1 year to 39 years. Similarly, the average age will increase in Airdrie (36 years) and Alberta (41 years).

Exhibit 28: Average Age Comparison

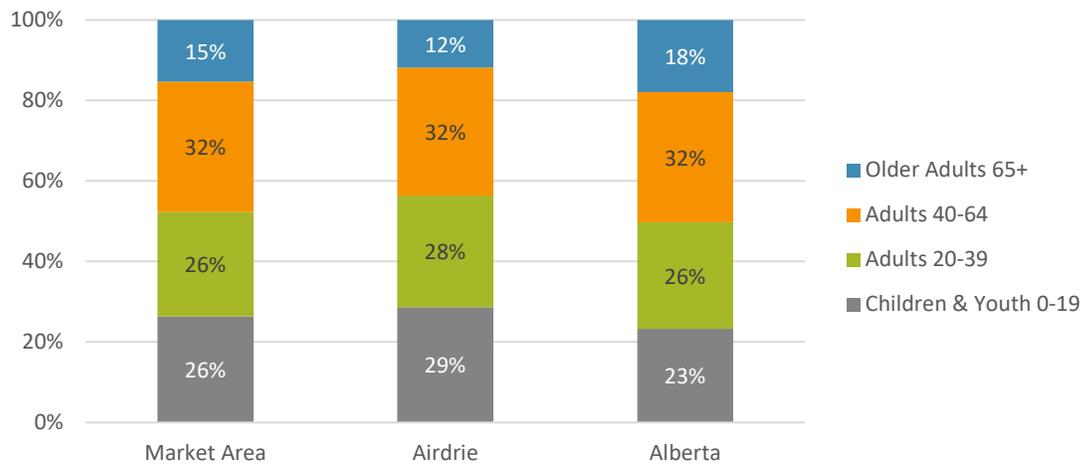


Source: SPM based on ESRI Business Analyst Population Projections, 2023.

Based on the population projections, the age distribution of the Market Area and the City of Airdrie is expected to continue to be somewhat younger than that of the Province.

- By 2032, 26% of the market area and 29% of the City’s total population is forecast to be under 19 years old, compared to 23% of Alberta’s total population.
- The population over the age of 65 years is forecast to be 15% in the market area, 12% in Airdrie and 18% in Alberta.

Exhibit 29: 2032 Age Distribution Comparison



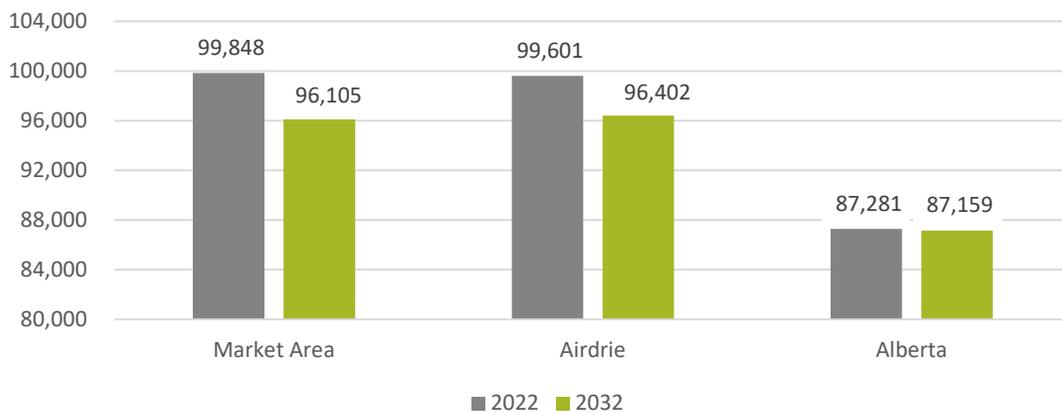
Source: SPM based on ESRI Business Analyst Population Projections, 2023.

Income and Recreation Spending

Data generated by ESRI Business Analyst showed that in 2022 the market area and the City of Airdrie had a similar median household income: Market Area - \$99,848 and the City of Airdrie - \$99,601. Both areas are projected to see a small decrease in the median household income in the next decade, as shown below.

In 2022 median household income in Alberta (\$87,281) was significantly lower than in the Market Area and in the City of Airdrie. In all three areas income is projected to decrease by 2032 as shown below. Considering fast and steady growth of Airdrie population and an improving economic situation in Alberta and Canada overall this trend may change once ESRI projections are updated.

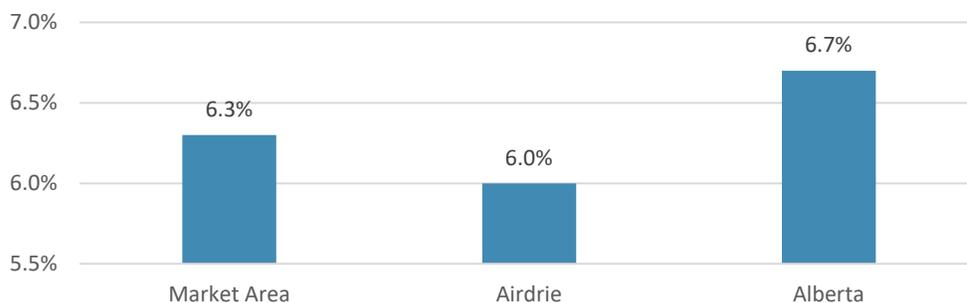
Exhibit 30: Average Household Income Comparison



Source: SPM based on ESRI Business Analyst Population Projections, 2023.

As a percentage of average total income, household spending on recreation as a whole by residents within the market area (6.3%) is somewhat higher than that of the City of Airdrie (6%) average, and both are slightly lower than provincial (6.7%).

Exhibit 31: Annual Average Spending on Recreation as % of Average Household Income, 2022



Source: SPM based on ESRI Business Analyst, 2023.

Contrasting with this, a more detailed assessment of spending by type of recreational activity showed that the market area and Airdrie households spent more on live events per annum than their provincial counterparts, as shown in the following table.

Exhibit 32: Spending on Recreation and Live Events Comparison

	Avg. HH Spend on Recreation	Avg. HH Spend on Live Events	Live Events Spend as % of Total Recreation Spend
Market Area	\$ 6,337	\$ 393	6.2%
Airdrie	\$ 5,994	\$ 415	6.9%
Alberta	\$ 5,847	\$ 259	4.4%

Source: SPM based on ESRI Business Analyst, 2023.

5.5 Competitive Supply of Event Facilities

We exclude event centres, and competitive supply of venues in the City of Calgary as we do not consider it likely that the City of Airdrie at this time (or in the context of a community recreation centre built within the next decade) will actively compete with those venues.

The exception to this are those special or niche events that can be expected to draw people from Calgary and which actively compete with venues in the City (such as the hosting of concerts).

Regarding the concert and entertainment market, competition is very much between venues in their attempt to secure the interests of the promoters themselves. If the promoter is satisfied with the facility and the business arrangements (often requiring the municipality to take a degree of risk in supporting the event over and above the rental of the building itself), then the facility can secure an event. To actively compete in that market, the City of Airdrie would need to develop specialist staff resources to work with the promoter market – this of course, they can do, but it is not the core business of the City, whereas it very much is for those venues with professional events management staff.

As part of the initial situational assessment, a review of the existing supply of trade and event venues within the local (City of Airdrie) and broader region was conducted.

The City of Airdrie has one special event and banquet-specific venue, one hotel that provide some degree of event or conference space, and the Woodside Golf Club which offers a ballroom for up to 130 people. The City of Airdrie is also home to the Bert Church Theatre which hosts a variety of live performances throughout the year.

Exhibit 33: Local Supply of Competitive Event Facilities

Local Venue	Address	Details
Bert Church Theatre	1000 East Lake Boulevard NE, Airdrie	<ul style="list-style-type: none"> • 377 seats • Professional grade sound and lighting systems
Airdrie Inn & Suites	52 East Lake Avenue NE, Airdrie	<ul style="list-style-type: none"> • 4 meeting rooms • Largest conference room: 1,900 sf • Total event space: 2,252 sf
Woodside Golf Club	525 Woodside Dr NW, Airdrie	<ul style="list-style-type: none"> • Maximum capacity: 130 people
Brella Vida	700 FallPro Park, 2889 Kingsview Blvd SE, Airdrie	<ul style="list-style-type: none"> • Maximum capacity: 200 people

Beyond the City of Airdrie, the largest and most relevant venues are found in the City of Calgary, including the Saddledome, Max Bell Centre, Grey Eagle Event Centre, Max Bell Theatre, among others. However, as indicated above, special event venues in Calgary are not considered to be competitive facilities for this project. Beyond Calgary, the Polaris Centre for the Performing Arts is a concert and event venue in Rocky View County. Details of this facility are provided below.

Exhibit 34: Regional Supply of Competitive Event Facilities

Regional Venue	Address	Details
Polaris Centre for the Performing Arts	8-261051 Wagon Wheel View, Rocky View County	<ul style="list-style-type: none"> • Capacity up to 250 seats • Ideal for vocal concerts, classical concerts, community events, teacher recitals

5.6 Compatibility of an “Event Centre” with Municipal Community Recreation Centre Functions

The relationship between event centres and the municipal community services mandate is relevant here to highlight the extent to which an event hosting capability will either help or hinder the primary function of supporting community access to recreation.

Very successful multi-use sport and entertainment centres – from examples such as the South Okanagan Event Centre (SOEC), Moncton’s Avenir Centre, and Kingston’s Leons Centre all operate with a primarily commercial mandate. They are operated by third party management

firms on behalf of the City, are specialists in securing the events trade, maximizing concession revenues, and creating signature events. The buildings they operate are scaled to compete with all others nationally (outside of those major City venues that can accommodate 20,000 people plus).

As a result, their role is distinct from the provision of community access to ice is clear. In the case of Moncton for example, the Avenir Centre is not counted in any way toward the supply of community recreational space even though rentals to community groups is accommodated. However, it is not scheduled as a priority at the outset of the season and expectations are set which require community groups to secure ice time in other, community rinks.

In the case of some other centres, there is a mixed approach, with a degree of scheduling of community use blended in such that the event centre does form part of the community ice and recreation inventory. This reflects the needs of each community but can carry some level of dissatisfaction as groups are provided with limited time and, from time to time, are relocated from the event centre as a result of a new commercial event. Add to that the variability of game length and some event centres in smaller markets have a “frictional” (or structural) vacancy rate in prime-time ice of 25% or more.

It is therefore essential to establish clarity around the purpose of the large capacity arena that also functions as an event hosting venue.

As will be further discussed in this report, the facility recommended is one that remains primarily a community facility. Based on this, we do not believe that a high prime-time ice vacancy rate is likely, and the facility would be appropriately described as a community-first venue.

In consultations with groups the consulting team heard a level of concern that the development of an “event centre” would take away much needed community ice time. We have addressed this in as much as the recommendations of this report do not include building a proto-typical event centre. We anticipate some loss of community access but given the predictability of the events: bid events scheduled in advance, no AJHL franchise at present, a focus on tournaments that are community use itself, this loss of community ice function is likely to be relatively limited.

6 Events Market Potential Drill-Down Assessment

Section 6 assesses the relative market potential for events to occur within the recommended large capacity arena at the SW Recreation Facility. A range of sporting and non-sporting event types are reviewed.

In summary, events that have the potential to occur at this facility are largely focused on ice and dry floor games and tournaments, competitive bid opportunities, some family entertainment, and smaller-scale trade shows and conferences. The latter two items depend largely on the design and flexibility of the bowl (i.e., removal of the boards, flat floor loading, etc.)

6.1 Overview

As noted elsewhere in this report, the consulting team is recommending that the City create a facility that can accommodate events, potentially host a hockey or hockey plus another franchise, and otherwise compete to bring provincial, and in some instances national events to the City.

We are not recommending the development of an event centre at this time based on a common understanding of the nature of that building type. The event capacity that we strongly promote is one of developing a large capacity arena with amenities that enable an event experience that is comparable to other modern arenas that also host a range of sporting and non-sporting community-oriented and commercial events.

This distinction is important as it impacts both the operation and the market mandate of the facility:

- The facility should be owned and operated by the City. It is primarily a community arena but with increased spectator and event hosting capacity.
- The operation of the facility should assume that there is an incremental deficit of some magnitude associated with operating the larger bowl, including the necessity of staffing the building during events, event set-up, take-down, scheduling complexities and other aspects of operating a more versatile venue. While revenues will accrue, there will be a range of overhead that cannot reasonably be charged to event promoters (whether these are community-oriented or commercial promoters) and decisions to support events become one of recognizing their economic benefits.
- As a result, it should not be expected that the facility aggressively pursue the non-sports events market – events will happen and can be scheduled but the scale of the facility and the decision (we recommend) to forego the type of added costs and design functionality to enable it to operate as a concert and theatre venue, suggest that this market is considered as a bonus as and when it occurs.

6.2 Games/Tournaments

Alberta has two NHL teams, five WHL teams, 16 Junior Hockey teams, five Junior B leagues with over 50 teams and is also home to the 8 teams AJFHL. Alberta is also home to the independent Hockey Super League. It is important to note that minor hockey leagues (below the Junior A level) are not included in the information below.

Alberta Junior Hockey League (AJHL)

The AJHL is an amateur hockey league based in Alberta with an age range of 16 to 20 years. This league is part of the Canadian Junior Hockey League (CJHL) and currently has 16 teams:

- Brooks Bandits
- Blackfalds Bulldogs
- Sherwood Park Crusaders
- Bonnyville
- Calgary (x2)
- Drumheller
- Okotoks
- Spruce Grove
- Grande Prairie
- Lloydminster
- Camrose
- Whitecourt
- Fort McMurray
- Drayton Valley
- Olds

The attendance for the league is presented below. The attendance pattern is a reflection of a number of variables including the strength of the market itself and the existence of competing opportunities to watch hockey such as in the Calgary market place.

Exhibit 35: AJHL Average Attendance Per Game, By Team

Team	2015-16	2016-17	2017-18	2019-20	2020-21	2021-22	2022-23	5-Year Avg.
Brooks Bandits	1,394	1,299	1,314	1,317			1,278	1,320
Fort McMurray Oil Barons	1,220	1,304	1,244	1,181			1,331	1,256
Grand Prairie Storm	1,002	1,204	1,363	1,255			1,271	1,219
Camrose Kodiaks	1,179	1,051	928	816			807	956
Lloydminster Bobcats	1,222	946	900	681			684	887
Spruce Grove Saints	754	715	976	850			911	841
Okotoks Oilers	660	711	793	761			844	754
Bonnyville Pontiacs	843	783	573	541			551	658
Drumheller Dragons	564	533	509	794			716	623
Whitecourt Wolverines	748	439	664	709			508	614
Sherwood Park Crusaders	559	661	618	787			390	603
Canmore Eagles	454	468	446	508			477	471
Drayton Valley Thunder	527	417	429	505			451	466
Olds Grizzlys	525	420	367	566			297	435
Calgary Canucks	217	221	207	208			300	231
Calgary Mustangs	230	205	151					195

Source: SPM based on http://www.hockeydb.com/nhl-attendance/att_graph_season.php?lid=AJHL1999&sid=2013

Alberta Junior Female Hockey League (AJFHL)

The AJFHL, established in 2009, is a junior level hockey league of players between the ages of 18 to 21 years. The league is made up of two divisions of 4 teams in each division:

South

- Chaos
- Storm
- Titans
- Eagles

North:

- Wolves
- Amazons
- Steele
- Fury

This type of league offers potential for Airdrie both from a simple user opportunity perspective and an important signal that Airdrie is leading the way in female sports development.

Western Hockey League (WHL)

The WHL is the highest level of Junior Hockey and is part of the Canadian Hockey League (CHL). Alberta currently has 5 teams that play in this league:

- Calgary
- Edmonton
- Lethbridge
- Medicine Hat
- Red Deer

The WHL is not an option for a facility in Airdrie at this time. The future development of the City to an assumed build-out population of 160,000 + suggests that at some point the potential for a larger sports venue that could accommodate a WHL level franchise may be viable. This is true even with the nearby presence of the Calgary market.

Needless to say, the reality of league operations, owner-requirements and the determination of non-competition zones between teams based on geography, would need to be taken into account with respect to larger scale semi and pro hockey league opportunities.

Exhibit 36: WHL Average Attendance per Game, by Team

Team	2018-19	2019-20	2020-21	2021-22	2022-23	4-Year Avg.
Edmonton Oil Kings	7,661	7,009		5,198	6,412	6,570
Spokane Chiefs	5,959	5,709		4,419	5,842	5,482
Everett Silvertips	5,614	5,730		5,341	5,840	5,631
Kamloops Blazers	4,007	4,179		3,770	4,092	4,012
Calgary Hitmen	7,363	6,742		4,777	4,874	5,939
Portland Winterhawks	5,914	5,540		3,325	4,509	4,822
Saskatoon Blades	3,911	3,605		3,390	4,506	3,853
Regina Pats	5,201	4,711		3,958	4,501	4,593
Seattle Thunderbirds	4,771	4,736		3,237	4,343	4,272
Kelowna Rockets	4,835	5,137		3,770	4,305	4,512
Red Deer Rebels	4,101	3,694		3,307	4,163	3,816
Victoria Royals	4,818	4,638		2,803	3,560	3,955
Lethbridge Hurricanes	3,971	3,970		2,983	3,525	3,612
Tri-City Americans	3,817	3,729		2,696	3,511	3,438
Vancouver Giants	3,826	3,920		2,843	3,462	3,513
Brandon Wheat Kings	3,761	3,490		2,933	3,200	3,346
Moose Jaw Warriors	3,347	2,981		2,665	2,884	2,969
Prince George Cougars	2,707	2,642		1,915	2,755	2,505
Medicine Hat Tigers	3,121	2,947		2,166	2,651	2,721
Prince Albert Raiders	2,615	2,642		2,334	2,392	2,496
Swift Current Broncos	2,398	1,954		1,480	1,837	1,917
Winnipeg Ice		1,503		1,583	1,649	1,578

Source: SPM based on http://www.hockeydb.com/nhl-attendance/att_graph_season.php?lid=WHL1999&sid=2013

Hockey Super League (HSL)

The HSL is an alternative to Minor Hockey for players under the age of 18. Currently the HSL has 13 divisions made up of 30 teams and approximately 1,300 players. This is a privately owned, independent hockey league and is NOT part of Hockey Canada.

This league represents a potential user of an expanded City of Airdrie capacity to supply ice and would be a potential source of tournament capacity.

6.3 Concerts/Theatre

As discussed above, the market for regular concert events is limited. This is borne out in other markets which are served by AJHL level facilities of 1,500 to 2,500 fixed seats.

The proposed building specs are those of a large capacity arena with seats – as they should be given the limited market for this category of events compared to the Calgary market place a short distance to the south.

6.4 Family Entertainment

Family entertainment is a broader category of opportunity which embraces both community-organized events as well as commercial events. Very often, they can be participatory, involving use of the flat floor for patrons as well as spectator based. Buildings that can improve the level of intimacy though removal of the hockey boards and glass, can create an ambience for which a hockey arena is ideal – particularly for events geared to children, dance, multi-court games events, and other types of games-related use of the flat floor that invites spectator viewing.

6.5 Trade Shows & Conferences

Larger trade shows are likely to be located in the larger urban market. However, smaller, community as opposed to business to business-focused trade shows (RV shows, home shows, garden shows, wine club shows, etc.) are all opportunities that can be readily sought. These are not events that require fixed seating, but they are able to leverage the other amenities of the building – from high quality ease of loading onto the flat floor, to catering, concessions and large attendance.

Conferences and the conference market are often lumped in with the trade show market and both are part of the MICE Tourism segment (Meeting, Incentives, Conferencing and Exhibitions). The arena facility type is not ideally suited to hosting conferences that often require a range of spaces including plenary session space and break-out room capacity. This is not to say that arena facilities cannot be configured to achieve these outcomes in some manner, particularly if the arena is part of a larger community hub complex, but by comparison to dedicated conference spaces, the market is more limited.

There are instances of large capacity arenas that are served by hotels close by which provide for direct access to the arena and offer conference meeting rooms. Where that is an option in Airdrie should be addressed through the site planning exercise.

At this stage in the development of the City, it is likely that the strongest demand for conference space remains in the City of Calgary and serviced by the range of private providers there. However, as Airdrie grows, the opportunity to achieve a higher level of accommodations plant (hotel rooms in a variety of discount, limited service, and full-service configurations) should be recognized. If land were made available as a commercial development opportunity in the SW of

the City in proximity to the community centre, the potential for the conference market making some use of the large capacity arena bowl would be possible.

6.6 Competitive Bid Event Opportunities

Competitive bid or rotational events are important to the overall justification of building into the Southwest Recreation Facility the capacity to host major spectator events.

Working closely with Provincial Sporting Organizations (PSO) there are a variety of opportunities for hosting competitive bid or rotational events that could be realized at the new recreation centre.

These types of events will of course include ice-related events (e.g., curling, figure skating, hockey, ringette, ice dancing, sledge hockey, etc.) but should not be limited to such. The City should seek to attract a variety of dry or flat floor sporting events as well. This could include, but not limited to, martial arts, boxing, volleyball, dodgeball, pickleball, tennis, wrestling, group dance, handball, etc.

Using the seats that are built is the goal. Any event that requires a certain capacity for spectator seating (as provided within the Southwest Recreation Facility) should be explored.

7 Potential Scale of Large Capacity Arena

This section details the recommended development concept for the SW Recreation Facility arena component, for a twin-pad facility with one community arena and one large capacity arena with seats. While this section speaks to the large capacity arena being in the range of 2,500 seats, it is important to note that at this point in the planning process it is less about the final seat count and more about the general concept that is being proposed – upsizing one arena to be able to accommodate a variety of events in addition to community use.

Considering the fact that two rinks are planned to be built at the SW site already, this section lays out the estimated cost increment to improve the capacity of one of the rinks to be a large capacity arena with seats - in the range of \$20M.

7.1 Facility Program Comparison

The facility program leverages off the community ice needs that form the backbone to any plans for arena development as part of a second phase of the project. For analytical purposes of cost approximation, the following program development and associated order of magnitude cost estimates assumes a twin pad arena development, with one pad developed as a large capacity arena with seating at 2,500 fixed seats.

Whether or not 2,500 seats is ultimately a number that can be carried, it is useful for purposes of cost framing to provide it as a maximum. In visual terms, it represents approximately 8 rows of seats if built as a 360-spectator seating bowl.

A typical AJHL franchise will not likely require 2,500 seats, and perhaps only half of that – but other, infrequent events will, and the community can readily benefit from having event capacity when it needs it in its premium ice arena. It is for this reason that establishing a reasonable upscaling of a community arena is highly advantageous:

- The community ice facility is required and hence that cost is effectively “sunk” as it pertains to the development of event seating bowl capacity.
- The additional seating is an incremental cost, and it is that cost and its operational impacts that should be assessed in terms of the value for money when compared to the economic benefits that sport hosting will allow.
- That cost should include the impacts of reduced community ice time as a result of event hosting. In this regard, the smaller seat count of this facility and its development as a large capacity arena with seats rather than an event centre with its attendant specifications, will ensure that community access to the facility is high. We have pegged that at 75% of normal usage and hence the operational cost carried for the large capacity arena in terms of lost community ice is 25% of the cost of a community pad.

- Of course, events will generate offsetting revenues but for consistency in terms of a cautious approach to planning, we assume that some events are more beneficial in their community social and economic impacts rather than in the bottom-line revenues to the City. This could include a sports franchise in this manner, but the City should strive to ensure that any licensee of the facility is at least cost neutral to the City in operating terms.
- An option for a four-pad facility is not included here as a result of our understanding of both need, the timing of that need, the planned further development of a third community centre hub over the longer term, and the likely site constraints.
- **We also recognize that the potential to develop a twin pad as part of the initial phase of development would represent the best approach, but not available for Airdrie at this time. It is likely, in our view, that a Phase 1 project that is restricted to aquatics alone may experience project costs that are less efficient in terms of maintaining the minimum acceptable space program and may be subject to scope creep. By adding the rinks, which are an essential core use of the overall facility – regardless of which phase of construction they represent – there is a strong possibility of improving the overall cost-versus program equation and meeting the needs of the City in both a timelier way and in a more fulsome manner.**

Exhibit 37: Facility Program Comparison

Basic Community Twin Pad	Twin-Pad with Large Capacity Arena
<ul style="list-style-type: none"> • 93,000 square feet • Assumes 10 dressing rooms. • Assumes 2 referee dressing rooms. • Second level mezzanine deck (finishes TBD). • Main level concession area. • Operational staff offices. • Storage areas, IT and janitorial closets. • Restroom allocation based on code. • Back of house designated space for, refrigeration system, snow melt, Zamboni storage (2) and maintenance shop. • Skate shop. 	<ul style="list-style-type: none"> • 114,000 square feet • Assumes 10 dressing rooms. • Assumes 2 referee dressing rooms. • Assumes primary tenant team space. • Spectator bowl with 2,500 fixed seats (900 retractable). Community ice facility at 250 seats. • Premium seating area (if desired). • Single concession in community ice rink with numerous concessions in spectator facility. • Team Store (see notes below)³. • Back of house loading dock included. • Back of house designated space for, refrigeration system, snow melt pit, Zamboni storage (2) and maintenance shop. • Skate shop (could be considered a basic community centre amenity).

³ Should a team be contracted as a licensed user of the facility, the notion of a team store, as well as team administration offices should be assessed carefully. Modern technology enables a smaller bricks and mortar footprint for box office (for the City), administration offices for the team and merchandizing for the team. We would anticipate that mobile merchandizing during events is preferable over a team store leased space – if only because the rents charged would need to reflect the economic rent of constructing expensive institutional-quality floorspace within the building.

Basic Community Twin Pad	Twin-Pad with Large Capacity Arena
<ul style="list-style-type: none"> Minimal seating on each rink (+/- 200). On-site parking 150 – 200 spaces. 	<ul style="list-style-type: none"> Additional restrooms for spectator seating based on code. On-site parking 500 - 1,000 for spectator bowl plus 100 for community ice pad (see separate section on parking).

7.2 Development Concept Considerations

Communities that are experiencing significant population growth should consider long term sport, recreation and entertainment needs when planning to add new venues to their community.

Our recommendations to such communities have been to consider a facility that can truly be designated as “multi-purpose”. Specifically, one that can provide as many community benefits as possible while likely not being a perfect solution for everything.

As such the consideration of a large capacity arena with fixed seating and connected to a second ice pad is worth exploring. Such a facility provides a wide range of community offerings while keeping local spending local and attracting visitors and spending from outside of the resident community.

Other considerations would include:

- Should the facility have a section of the bowl comprised of retractable seats to allow for the floor size to be increased for non-hockey related activities; dirt events (rodeos, motocross, monster trucks) and trade shows. The NHL Arena size is, 85’ x 200’. With retractable seating, usable floor space increases to 110’ x 200’. This allows, as an example, for a trade show to be set up in a 10’x10’ grid with 10’ aisles, thus maximizing the number of booths and then revenue. We recommend looking at this, but with the scale of seating likely to be appropriate we assume that retractable seating is not warranted. That said, having the ability to remove, store and re-install the rink boards and glass to enable a range of events is likely to be important.
- Will the market support premium seats; luxury boxes, loge boxes and club seats. Premium seating sections have multiple price point offerings which cater to a wide range of corporate clients increasing the revenue stream for the building operator and possibly the hockey tenant. At this time, we do not recommend any specialised seating designed to market corporate use – if the facility is ultimately home to a hockey team in the AJHL or similar, then at that time the potential for reconfiguring the approach to seating in this way – and in partnership with the team as a cost contributor – can be undertaken.
- Is a full catering kitchen required to support the activities to be scheduled for the facility. With premium seating and the possibility of catered functions on an expanded ice floor, a full-service kitchen is required. This maybe already factored into the community centre overall functional space program to serve the range of needs related

- to community use. If so, it can be leveraged at no additional cost to the event hosting role of an arena.
- Is sufficient acreage available to provide for additional parking requirements. Code usually requires one parking space for each 3 spectators.
 - Is a loading dock required for back of house deliveries. A hockey specific building would not require a loading dock, possibly with levelers, unless it was a multi-purpose facility with concert offerings.
 - Is a designated team area required for the primary tenant. Dressing room, player lounge, training facility, physical therapy area, team store and offices. The addition of a major tenant (hockey) requires exclusive team areas and as such an increase in the square footage of the facility and accordingly the cost.

Further to the point above, although teams in both the BCHL and AJHL operate with less than the overview we will provide, from a long term (financial) sustainability, the following are suggested guidelines for securing a long-term Junior A hockey tenant. The basic program has been suggested by the BCHL. Further enhancements would certainly be welcomed by the team but in our estimation, are not required to secure the tenant.

- **Dedicated Space:** The team would require a dedicated dressing room area for twenty-two (22) players with athletic training area, equipment storage and coaches' office. A business office within the arena along with a Team Store or areas within the concourse for merchandise stands/carts would also be requested.
- **Seat Count.** Recommended fixed seating requirements range from 2,200 – 3,000 seats in the main bowl of the arena. Again, many current Junior A teams play in facilities with less seating, from a long-term perspective and in a growing community this range is considered to be optimal.
- **Type of Seat.** Actual theater type seat is preferred with a seat size range from 20 – 22 inches. Non padded is acceptable. An opportunity to provide a mix of premium seats would enhance the spectator experience and provide an additional revenue stream for the team and the facility. Such could include a variety of suites, loge boxes and club seats. The final premium seat allocation by type would be determined by a market analysis.
- **Amenities.** Several additional services that would assist in securing the team and sustaining the team could include multiple concession locations within the building (and as such as percentage share of sales), electronic/digital advertising (includes scoreboards, ribbon board, concourse signage), spectator parking in close proximity to the arena, upgraded audio, visual and lighting displays and party rooms (group sales functions).

7.3 Proof of Concept

The idea of building a twin pad arena development with one pad developed as a large capacity arena with seats is a proven concept that has been successfully implemented across the country. While the examples provided below vary in their spectator seating capacities, with three of the four examples having over 3,000 seats, they are all venues that are community-focused with the capacity to accommodate both sporting and non-sporting events.

Nisku Twin Rink Recreational Facility, Nisku, AB

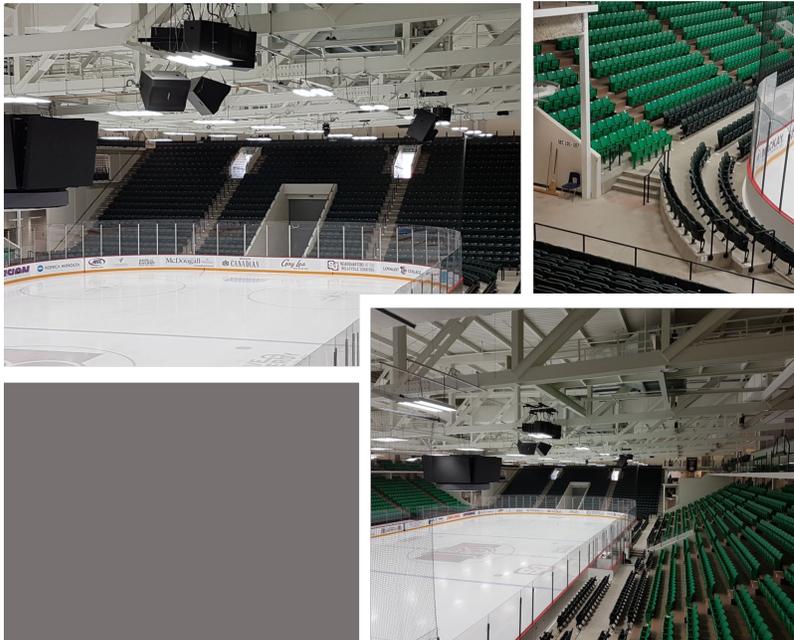
Nisku's newest ice facility is a twin-pad facility with 1200+ seats in the main rink (with centre hung scoreboard) and 600 seats in the secondary rink. The facility features two NHL-size rinks, a box office, a fitness area with a change room for players and a separate one for owners, a "pro-room" with sauna and steam room, a player's lounge, a retail outlet, and a coach's room. In addition, the facility also houses press/media spaces, an office area with manager and break rooms, a concession area with a lounge, four box seat suites with balcony viewing, and washrooms. There is also a restaurant and serving bar, a commercial kitchen and seating that has views to both rinks. It is understood that the facility's construction costs are in the range of \$70M.



Photos: Government of Alberta, Major Projects website, <https://majorprojects.alberta.ca/details/Nisku-Twin-Arena/10832>.

CAA Arena, Belleville, ON

The existing “Yardmen’s Arena” (now the CAA Arena) was substantially renovated in 2017-2018 with the addition of seats (for a total of 4,400 fixed seats plus 500 non-fixed capacity), concessions, boxes, and additional improvements to tenant spaces, in advance of the Belleville Senators of the AHL becoming the primary licensee (primary tenant) for the facility. As described in Section 4.5, this large capacity arena is part of Belleville’s major recreation facility, which houses three community arenas, a gymnasium, and large aquatic centre.



Belleville CAA Arena Expansion

- 4400 fixed seats + 500 non-fixed (4800 likely official capacity)
- \$21 million / 40 year solution
- Big question: could suites be added
- Olympic ice reduced = bottom and top loading circulation
- New northern wing – best seats in the house
- Roof truss / floor to truss height a compromise

Photos: SPM

Credit Union Place, Summerside, PEI

Credit Union Place is a multi-purpose recreation facility that opened in 2006. The facility houses two NHL size ice pads, an aquatic centre, meeting and convention rooms, a fitness centre with two squash courts and weightlifting equipment, bowling lanes and an indoor walking track (at top of seating bowl). The large capacity arena has seating for 3,700 spectators, ten luxury boxes, 8-foot-high glass surrounding the ice surface, and a centre hung retractable scoreboard. The community arena has bleacher style seating for approximately 700 spectators.

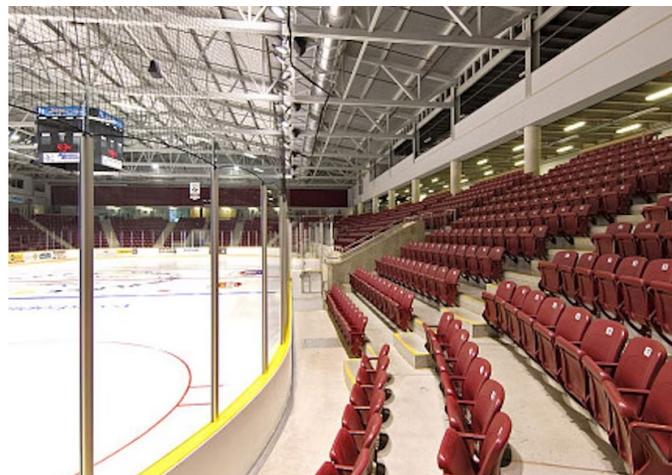


Photo: Athletic Business.
<https://www.athleticbusiness.com/project-galleries/architectural-showcase/ciLrDWEerl/credit-union-place-summerside-pe1>

K.C. Irving Regional Centre, Bathurst, NB

The K.C. Irving Centre is a twin-pad facility that opened in 1996. Since 1998, this facility has been home to the Acadie Bathurst Titan of the Quebec Major Junior Hockey League (QMJHL). The large capacity arena has seating for 3,524 spectators for on-ice events. This includes 24 private boxes. Capacity for other events can reach 4,400 spectators in the main arena. The second ice surface can be used as a multi-purpose space and for major hockey tournaments requiring a twin pad facility. The arenas are part of a multi-use complex, that includes a community learning centre, a senior's room, ticket box office space, lounge and canteen facilities, Bathurst Sports Hall of Fame, and a walking track that surrounds the concourse level of the main rink.



Photos: City of Bathurst. <https://www.bathurst.ca>

7.4 Understanding the Cost Increment for a Large Capacity Arena

The following provides estimates of the expected range of total project costs associated with a basic twin-pad arena facility and a large capacity arena with seating.

The estimated total project cost range for the basic twin-pad option includes all soft costs (i.e., A/E fees, permits, material testing, environmental testing, commissioning, and owners contingency), hard construction costs (i.e., General Contractor fee, General Conditions/Requirements, insurance, contingency), Furniture, Fixtures and Equipment (FF&E), and the cost for 200 parking spaces.

Similarly, the estimated total project cost range identified for the large capacity arena with community ice pad includes all soft costs, hard construction costs, and FF&E as identified above. It excludes the cost for an additional 500 to 1,000 parking spaces, which could add (depending on site development conditions) a further \$3.75 million to \$7.5 million. Parking is not a definitive cost and should be addressed strategically as part of site development options.

The total project cost ranges provided assume a pad-ready site with site preparation only, mass grading completed by others and utilities stubbed to site location.

Escalation should be assumed at 7% to 10% per annum.

Exhibit 38: Project Cost Range Estimates

	Estimated Facility Area (Sq. Ft.)	Total Project Cost Range (2023)	
		/Sq. Ft.	Total
Basic Community Twin-Pad Arena	93,000	\$625 - \$650	\$58M - \$61M
Modest Large Capacity Arena with Integrated Second Community Ice Arena	114,000	\$625 - \$680	\$71M - \$78M
Incremental Parking Needs (Subject to Traffic Impact Analysis)	500 spaces (surface) – equivalent to 5 acres		Approx. \$3.75 million

7.5 Parking Demand and Site Constraints

Parking represents a sizeable challenge if the site is determined to be insufficient to accommodate between 5 and 10 acres of surface area for parking (including ingress, egress, and circulation space). The approach to parking should be strategic and it should be recognized that it creates a natural limitation on the scale of facility that can be provided.

Rather than assume off-site parking, shared parking with the school, and on-street parking is easily attainable, we recommend that the City approach this from a “whole site” perspective:

- Recognize that the site is a community hub, first and foremost, well connected via arterial roads and the QEW inter-city highway, but primarily designed with community uses in mind.
- The notion of acres of parking dedicated to an event centre is further reason why we recommend that this facility be appropriately scaled as a community first facility with spectator seating capacity sufficient to accommodate attendance typical for the AJHL.
- Recognize that some shared parking is expected based on the differential time of day demands at the community centre versus the adjacent high school.
- Recognize that sell-out events at times of the year that are likely to minimize modal split (i.e., winter) will require an innovative traffic and parking management approach. These events are expected to be few and far between. What is important is that the City does not overbuild surface parking on this site for event management purposes. However, the conditions of “tight” parking supply Genesis Place are reason to ensure that sufficient community centre parking is made available for daily demand levels.

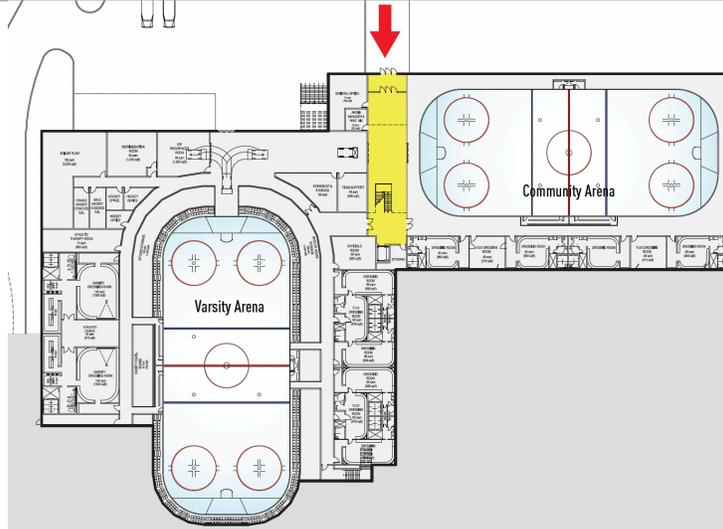
7.6 Examples of Comparable Projects & Costs

There are several examples of similar projects across Canada and the United States and their associated costs, as provided below. All costs are in Canadian dollars unless noted otherwise.

Location	Project	Details	Est. Cost
City of Spruce Grove, AB	Community Centre Project	Spectator facility with 1,200 fixed seats, community ice surface, library, cultural space.	Under construction with cost at \$76M



Location	Project	Details	Est. Cost
University of Alberta	Golden Bears Hockey Complex	2018 study for a twin ice facility, with a spectator bowl of 3,000, to be in the South Campus area.	Project did not go forward but cost estimate in April of 2018 was \$72M



Sierra Planning and Management

Location	Project	Details	Est. Cost
City of Penticton, BC	Twin Ice Pad Development Concept	Concept developed in 2019. Delayed in 2020 due to the Pandemic. Currently in review to re-open discussion. Project included a two-ice sheet facility with ten dressing rooms which would be attached to the South Okanagan Event Center ("SOEC"), a 10,000 SF sports training facility and 10,000 square foot office complex for the Okanagan Hockey Academy.	2019 cost estimate was \$34M Estimated 2024 cost to complete \$52M



Sierra Planning and Management

Location	Project	Details	Est. Cost
City of North Bay, ON	Community and Recreation Centre Project	Two ice pads with seating for 250 spectators each; 12 change rooms with a capacity of 25 people; a barrier-free referee room; and a 223-space parking lot.	Upset limit of \$52M



Location	Project	Details	Est. Cost
Town of Whitby, ON (Brooklin)	Whitby Sports Complex	164,000 square foot facility includes twin rinks (seating unknown at this time), the largest indoor aquatics in Durham Region, walking track and double gymnasium.	Construction budget: \$126M Total project cost: \$155M



Sierra Planning and Management

Location	Project	Details	Est. Cost
City of Peterborough, ON	Miskin Law Community Complex	Twin-pad arena complex (500 seats on each pad) with an elevated walking/running track, 12 team changerooms, a team training area, as well as a 5,000 sq. ft. library, two multipurpose rooms, and commercial office space.	Cost estimated at \$62M



8 Operating Financial Implications of a Large Capacity Arena

This section identifies potential financial implications of a new arena facility as well as considerations related to facility operations and management. While it is not appropriate at this stage of the planning process to provide details of a required operating budget or revenue projections, it can be stated that the City's existing approach to cost recovery has been successful, and it is assumed that this model will be employed in its future recreation centres going forward.

For purposes of this report, we assume that the per pad annual operating deficit for the baseline provision of community ice arenas is \$250,000 per pad subject to annual escalation. This section also provides the assumption of a net incremental increase in the annual deficit for the large capacity arena with seats of \$250,000 plus annual escalation. Therefore, the total deficit of the recommended twin arena facility that includes a large capacity arena as a business unit within the SW recreation facility would be in the order of \$750,000.

8.1 Approach to Cost Recovery for Community Recreation Centres

At this preliminary stage of planning for a new multi-use recreation complex, it is not appropriate to speculate as to the required operating budgets and revenue projections. The project has yet to be defined in detailed activity and space planning terms, and phases of development and therefore operations yet to be formally adopted as the approved implementation plan. We recognize that the plan is to develop in phases, but we recommend that the consideration of both aquatics and arenas together as a single phase should be given further attention. The final section of the report provides further details on this.

Currently, we understand that Genesis Place is operating with a strong financial position. In 2022, the recorded annual position was a deficit of \$1.5 million (City of Airdrie Annual Report, Year ending Dec 31, 2022), however this was made up entirely of reserve contributions and debt on initial construction. This success is due in part to the pent-up demand because of the pandemic as well as the City's effective mix of pricing and access to its facilities. The growth of passholders that comprise an array of passes and admissions for activities creates an incremental revenue that helps cover the subsidization necessary for certain services including the heavy infrastructure comprised of the ice rinks and indoor pool.

A strong management ethos to move toward this operating model while meeting the needs of the whole community including those in need of access assistance is a hallmark. In 2022, there were some 381,761 passholder scans with 377 passholders and 375 program participants on the City's Fair Access Program. This contrasts with a lower reliance on passholder revenue in years prior to the Pandemic – since 2017, we understand that passes and admissions have climbed from between 35% and 40% of revenues to over 55% in 2022.

The City's Ebbesen Twin Arenas records what we regard as typical net operating deficits in the range of \$450,000 including the transfer of revenues to reserves. We would broadly define the per pad subsidy to be in the order of \$200,000 and consider this typical for a facility of this type.

It is also recognized that the Plainsmen Arena annual deficit is considerably smaller (\$67,000 last financial year) reflective of the nature of that facility and its minimal scale and amenities.

8.2 Indicative Performance – Baseline Community Arena Versus 2,500 Seat Arena

Based on the proposition consistent in this report to price-out the likely capital cost (high level estimate) for a twin pad concept, we also provide an estimate for the annual operations of the twin pad. This estimate does not:

- Consider whether the facility will operate year-round.
- Consider the operating efficiencies (across several departments including the potential for waste heat recovery) that would arise because of its integration with an indoor aquatics centre.

These matters of design and operational considerations are most relevant but are appropriately addressed as part of a more detailed business planning exercise. For the purposes of this report, a more strategic approach is beneficial and one that does not provide an overly optimistic assumption of annual net operating income.

For purposes of this report, we assume that the per pad annual operating deficit for the baseline provision of community ice arenas is \$250,000 per pad subject to annual escalation. This amount does not include any transfer to capital reserves and any such policy in this regard would increase the annual deficit.

As we are concerned in this report with the incremental impact of creating a spectator event bowl as one of the community arenas, the more relevant metric is the expected higher cost of operating this space versus a traditional community ice pad. Determining these higher costs is dependent on several factors including (as examples):

- Gross floor area, number of floors (if relevant) and overall range of amenities includes in the facility which will require operation, servicing and maintenance and eventual replacement.
- The number and type of events hosted at the venue – the degree to which they are community events supported with subsidy, to flat-fee events to other promoter-led commercial events that cover the house nut as well as a net revenue to the City. This might also include events with a level of stepped performance whereby higher attendance or participation results in higher shares of access to event revenues for the City.

It is more likely that the range of events at the facility would be accommodated on a flat fee rental basis, and the question as to the extent of revenue surplus from events is one of the degrees to which City operational costs can be covered from the rent charged.

The type of events that can be accommodated at the venue are considerable but the number of them, and the balance of costs and revenues to the facility should be the subject of a more detailed business plan should the City decide to move forward with next stage concept design, confirmation of scale and amenities and thereby enable a more defined appreciation of the potential competitiveness of the facility in capturing the events market.

For the purposes of the present report, we are assuming a net incremental increase in the annual deficit for the large capacity arena with seats of \$250,000 plus annual escalation. This excludes any requirement to transfer revenues to a capital reserve to fund annual lifecycle capital investment in later years.

This figure is over and above the assumed baseline deficit of \$250,000 to operate the arena as a community ice surface. It also assumes that the included space in the large capacity arena does not include a very large additional conference or banquet style facility but may have a modicum of meeting room space (including future media room).

The resulting annual deficit excluding capital reserve is allocated at \$500,000 subject to more detailed market and risk assessment should a concept design be commenced. The total deficit of the recommended twin arena facility as a business unit within the multi-use community recreation centre would be in the order of \$750,000.

These numbers will of course need verification at the appropriate time. In terms of their impact on City budgeting for services, the existing model of cost recovery at the City's Genesis Place facility is, we assume, a model that the City would wish to replicate at the new SW facility once it is operational. The additional cost of operating the large capacity arena would need to be considered in terms of its impact on the overall cost recovery of the facility which will be lowered somewhat.

However, the goal is to meet a broader range of objectives. Break-even cost recovery in the supply of recreation assets that also meet a tourism and economic mandate is not the only consideration. Our review of economic impact later in the report is particularly relevant in this regard.

8.3 Risks to the Deficit Projections

There are inherent risks to the deficit projections itemized above as well as risk in terms of securing the hoped-for economic impacts of improving the City's sport hosting capacity. Aside from the more obvious macro-economic risks that the County and World has faced in recent years, the ongoing challenges associated with securing skilled labour can also heighten annual costs. Additionally, the approach to management of the facility, the degree of emphasis placed on commercial events versus lower paying/higher cost community events (separate and apart from community use of the ice), and the overall approach to marketing the facility, are factors that can dramatically impact the annual deficit projections.

None of the above speaks to the risks associated with obtaining a hockey or other sport franchise as a facility licensee (often referred to as a prime tenant). Should a tenant be secured in the future, it will likely be because of the City investing up front in a facility that has sufficient

seats, scale and amenities to meet the needs of a spectator hockey team (and/or other sport). That is a risk, but we take the view that the lost opportunity is a greater risk. Simply put, the City will need to invest in a new community arena either as part of the SW facility or through other means. To do so, while not securing the gain in sport tourism capacity through an incremental capital cost is likely to be a significant lost opportunity – remedied only in subsequent years if and when a third ice complex/multi-use facility is initiated.

As our subsequent analysis shows, as an incremental cost, the benefits of developing an event bowl, even without a current primary tenant, outweigh the costs.

Note this is not the same as assuming that there is capital funding available for the project. On that question, we are aware that a funding strategy will need to be developed to justify the additional costs. In order to do that, a longer term view of the opportunity should guide investment decisions – as the City rapidly transitions to an urban centre of some significance (potentially the third largest City in the Province), it would be a market risk, an economic development risk and a quality of life risk for current and future residents - in short, a lost opportunity - if the City remained incapable of hosting major provincial events.

We would also go further to suggest that pushing out the decision to invest in hosting capacity to a time when it is hoped the City's growth would better accommodate the financial burden of such as facility, may be simply expand rather than remedy the problem. The progressive accretion of hosting capability across facility types – including indoor and outdoor venues – enables a more incremental approach to funding challenges and provides a long-term plan for transforming the overall capacity of the City to take advantage of the growth that is forecast.

It may well be that within the next 20 years the City will have developed to the point where it can support a considerably larger event centre, but awaiting growth to justify a single, larger event centre may deny the City the short- and medium-term advantage of creating a hierarchy of City, institutional and privately-owned assets that promote visitation, spending, and social well-being in the City.

8.4 Private Sector Management and Operational Risk Sharing

Based on the concept put forward in this report, there is no current benefit to separating out the operational management of the large capacity arena from the other rink(s) or the Southwest Recreation Facility as a whole. Those community recreation centres that include an arena with large seating capacity, are almost always maintained and operated by the municipality and its management team.

In several of the larger event centres in Canada there have been attempts to utilize private sector management for a range of publicly owned recreation and tourism assets where there are located on the same site. A good example of this is the management by Spectra of the South Okanagan Event Centre, together with the Penticton Trade and Convention Centre, as well as at least one of the two community arenas on the same campus. However, in the case of Airdrie, the existence and primacy placed in developed a major aquatics complex, followed by a community-focused arena complex, is likely reason enough to warrant municipal operation as

the only viable option. The YMCA as another manager operator is not typically known for any involvement in operation of ice arenas.

There are several delivery models by which the facility can be designed, financed, built and operated but it is purposeful to separate out the consideration of ice in this regard.

Ice arenas offer a model that the private sector can pursue, not only as managers for and on behalf of municipal owners of facilities, but as owners, operators or a combination of ownership and leasing of facilities to municipalities. There are a number of possible business arrangements that can limit the municipal requirement to directly fund the capital associated with construction upfront as would be the case in a traditional municipal ownership model.

However, as noted above, given the importance of this facility to the City as a flagship multi-use facility – and its prospective scale – it does not lend itself to a public-private partnership of the kinds noted above.

Private risk-taking in the development, financing and operation of event centres (generally as a concession whereby the municipality pays an annual fee over the life of an extended contract period) to cover costs either for capital and operating deficits or annual deficits in the case of projects where the municipality funds capital construction) is designed to achieve two objectives:

1. Transfer some but not all the risk of construction and/or operations to the private sector; and
2. Create certainty for the municipality in terms of its financial commitments over the period of the agreement.

The risk to the municipality in successfully enforcing its preferences in terms of facility governance, operations, and ongoing investment is one of the reasons why this model is not pervasive even for larger event centres.

In the case of an event centre-style operation within a community recreation complex, a private partnership model of this kind is not appropriate.

9 Economic Impact Potential

This section provides the potential for economic impacts from the development of a large capacity arena with seats. When compared to event centres, these smaller venues, such as those with 2,500 seats or less, have a smaller impact that are much more local in nature, but they should be considered as a centrepiece for community development. Three hypothetical events are assessed in terms of their economic impacts, which are each estimated to be in the \$200,000 to \$400,000 range for initial expenditures.

This section also details the Benefit-Cost Ratio (BCR), a measure of the expected benefits of a project relative to the costs, expressed generally in monetary terms. A BCR greater than (>) 1 = project has value to proceed (analytically). Even with a full accounting of capital costs and a more modest assessment of revenues in the form of economic impact, the project registers a positive benefit-cost ratio. This is indicative of the strong potential associated with this project, and the City of Airdrie, if conceived of as an enhancement (or upscaling) of community infrastructure in response to the market opportunities for event hosting and sport tourism.

9.1 Description of Economic Impact Modelling

The results of this analysis should be treated as a guideline to the economic impact of a potential large capacity arena based on simple assumptions regarding its scale, operations, and location. Should any of the key assumptions which underlie the analysis change – such as the capital costs of the facility or its capacity, the economic impacts can be expected to vary. Importantly, the analysis of impact assumes that the macro-economic environment remains stable and that normal business cycles are assumed to occur.

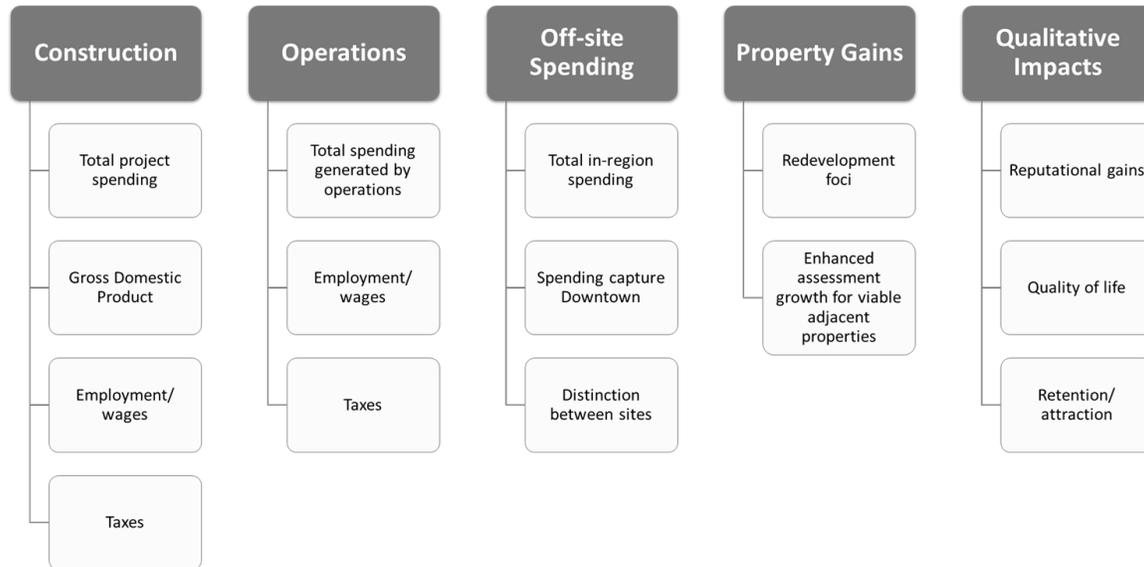
Public policy decisions beyond the decision to invest in a new facility can be expected to influence how much of a contribution the arena facility can make to localized economic development. Evidence from elsewhere demonstrates that impacts are maximized only where wider public investment and policy decisions are moving in the same direction. While there are significant impacts which can be estimated, it is also important to recognize that economic impact is less about the number than it is about the stimulus that significant investment in public infrastructure can have on investor confidence and building activity. For example, in the context of downtown event centres, it is quite common for an injection of public investment to spur other risk takers to invest in buildings. Depending on location, the biggest impact is the incremental development of commercial uses around a spectator venue, and often residential and smaller scale commercial development around a major community recreation facility.

9.2 Range of Measures

There are a range of measures possible when considering economic impact and we recommend taking a broader perspective, going beyond a sport-tourism lens of event generation. As large facilities, sometimes destinations, event centres are inspiring examples of public investment and

can generate sometimes subtle recognition of the value of surrounding real estate. There are knock-on impacts, typically measured in terms of gradual development over decades in the surrounding area or deepening of the service offer because of the improved infrastructure. As an example, a major new publicly funded sports centre can help improve the market for and timing of development in the surrounding area. New investment can open-up potential for new services which themselves lead to other opportunities. In this way, initial investment is seen as the seed capital that can inspire a degree of change that is ongoing.

Exhibit 39: Ideal Range of Measures



9.3 Definition of Terms

Several measures of impact assessment including **direct**, **indirect**, and **induced** effects are employed in the analysis which follows. These terms are described as follows.

Direct Impact: Direct effects are associated with immediate changes in demand generated by employment, personal and household income, government expenditures, and private and public capital investment. This includes investment in construction, the spending and wages in the facility, and the spending outside of the facility by patrons. Direct impacts can be measured in a number of ways – all of which are alternatives and not cumulative measures. These include total spending, Gross Domestic Product (GDP), income, employment and of other related measures such as sales and income taxes generated. Direct investment and employment will create iterative rounds of income, employment creation and spending. These multiplier impacts are referred to as indirect effects and induced impacts.

Indirect Impact: Indirect effects essentially are inter-industry impacts. Changes in employment, household income, governmental expenditures, and private and public capital investment added from industry purchases of all items needed to furnish a

product or service are measured. Indirect effects measure the impacts of these purchases.

In terms of the employment impacts during construction, indirect employment refers to the employment created in other industries which supply the materials (goods) and other inputs (services) necessary for the construction work. In terms of the ongoing operations of any facility or surrounding business, indirect impact relates to employment created in businesses which supply goods and services necessary for the ongoing operations of the business.

Induced Impact: Input-Output modeling also can potentially estimate induced effects. Induced effects are changes in spending patterns of households caused by changes in household income generated by direct and indirect effects. These new expenditures are reintroduced into the economy as a new demand and are more diffused across the national economy. Given this, we focus on the direct and indirect impacts which have a greater regional impact.

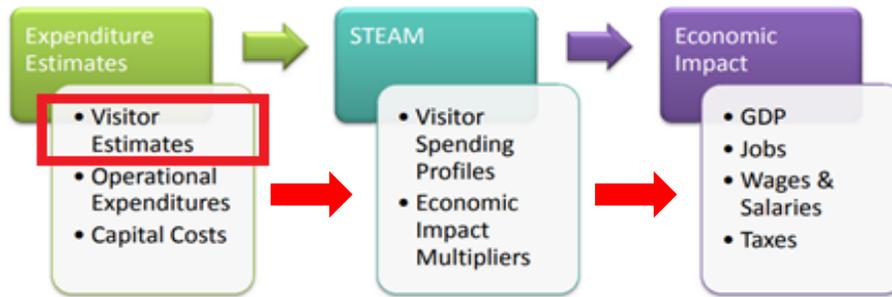
9.4 Event-Related Impacts

This section includes an assessment of the potential impact that events held at a new ice facility in Airdrie may have on the local economy. Measures of impact illustrated in the analysis include localized spending impacts, off-site spending, and taxes. These economic impacts are based on the participants' spending only.

Other measures currently not included in the model results are the ongoing impacts of building operations and qualitative factors of developing a new recreation facility. Qualitative factors can have impacts on the health and wellness of residents, promote physical activity and lead to an improved quality of life. These qualitative impacts can have broader benefits related to health care needs over one's lifespan. Relevant factors that can be assessed in the analysis include wellbeing and wellness, physical activity, and its beneficial relationship to overall health. Qualitative measures would be present whether the facility includes a large capacity arena or not but has the potential to be higher when the facility can accommodate a broad variety of events.

The Sport Tourism Canada's Steam 2.0 Model enables estimates of expenditures from sports events, the impact on GDP and industry output, and the additional tax revenue for the host municipality –The City of Airdrie, the Province, and the Government of Canada.

Exhibit 40: Economic Impact Assessment Model (STEAM)



The **initial expenditure** value represents the total amount of new visitor spending in the local economy as a result of hosting the event. This represents the money being spent in the community without the application of any economic impact multipliers.

GDP represents the total value of production of goods and services in the economy resulting from the initial expenditure (valued at basic prices). This economic impact represents the net measure of changes in economic activity. This category is representative of the economic activity that took place in the larger economy as a result of hosting the event.

Localized off-site spending impacts are defined as the direct spending impacts from spending by patrons off-site from the facility. Localized off-site spending also creates multiplier impacts that result from the initial input of spending. Applicable sector multipliers include accommodation and food services, retail and arts, entertainment, and recreation.

Taxes represent the total direct and indirect amount of municipal, provincial, and federal taxes supported by the events under analysis. Property taxes on municipal properties in Ontario are collected by the province. Sales tax portions are 13% - 8% provincial and 5% federal.

Industry output represents the direct and indirect impact on industry output generated by the initial tourism expenditure. It represents the total of all economic activity that took place as a result of the event. This category involves double counting on the part of the intermediate production phase.

9.5 STEAM Results for Three Hypothetical Events

Three events were modelled to estimate potential economic impacts if such events were held at a new large capacity arena venue. These include:

- Scenario A: Alberta Boston Pizza Cup (Men's Provincial Curling Championship)
- Scenario B: Minor Hockey Tournament (Net new, as existing facilities are not able to accommodate additional events)
- Scenario C: RV Show

Assumptions (event parameters) and the results of the economic impact assessment are provided below.

Scenario A: Alberta Boston Pizza Cup (Men's Provincial Curling Championship)

Assumptions:

Event Parameters	Men's Provincial Curling Championships
Type of event:	Provincial – adult event
Event duration:	6 days (5 nights)
Year:	2023
Participants:	Adult
Total participants:	65 athletes, 10 officials
Total attending:	1,000
Percent local / out-of-town participants:	20% / 80%
Avg. stay for out-of-town participants:	3 nights

STEAM 2.0 Model Outputs:

Economic Impact Category	Men's Provincial Curling Championships		
	Airdrie	Alberta	Canada
Initial Expenditure (Visitors/Participants)	\$409,338		
GDP (Direct & Indirect Impact at basic prices)	\$193,166	\$194,369	\$197,055
Employment (full-year jobs)	2.8	2.8	2.8
Wages and Salaries	\$127,680	\$128,486	\$129,988
Taxes (Direct)	\$62,661	\$62,898	\$63,571
<i>Federal</i>	<i>\$38,300</i>	<i>\$38,430</i>	<i>\$38,779</i>
<i>Provincial</i>	<i>\$19,716</i>	<i>\$19,794</i>	<i>\$20,074</i>
<i>Municipal</i>	<i>\$4,645</i>	<i>\$4,674</i>	<i>\$4,718</i>
Industry Output (Direct & Indirect)	\$469,667	\$531,975	\$629,627

Scenario B: Net New Minor Hockey Tournament

Assumptions:

Event Parameters	Net New Minor Hockey Tournament
Regional -	Regional – youth event
Event duration:	3 days (2 nights)
Year:	2023
Participants:	Youth (ages 8 to 17 years)
Total participants:	1080 athletes
Total spectators attending:	1,620 (assume 1.5 guests per athlete)
Percent local / out-of-town participants:	20% / 80%
Avg. stay for out-of-town participants:	1.5 nights

STEAM 2.0 Model Outputs:

Economic Impact Category	Net New Minor Hockey Tournament		
	Airdrie	Alberta	Canada
Initial Expenditure (Visitors/Participants)	\$266,414		
GDP (Direct & Indirect Impact at basic prices)	\$125,520	\$194,369	\$197,055
Employment (full-year jobs)	1.8	1.8	1.9
Wages and Salaries	\$83,147	\$83,681	\$84,647
Taxes (Direct)	\$40,833	\$40,990	\$41,424
<i>Federal</i>	\$24,951	\$25,037	\$25,263
<i>Provincial</i>	\$12,870	\$12,922	\$13,102
<i>Municipal</i>	\$3,012	\$3,032	\$3,060
Industry Output (Direct & Indirect)	\$305,729	\$346,554	\$410,308

Scenario C: RV Show

Assumptions:

Event Parameters	RV Show
Type of event:	Regional
Event duration:	5 days (4 nights)
Year:	2023
Participants:	Adult
Total participants:	75 vendors, with 3 representatives each
Total attending:	3,750
Percent local / out-of-town participants:	20% / 80%
Avg. stay for out-of-town participants:	6 nights

STEAM 2.0 Model Outputs:

Economic Impact Category	RV Show		
	Airdrie	Alberta	Canada
Initial Expenditure (Visitors/Participants)	\$263,712		
GDP (Direct & Indirect Impact at basic prices)	\$106,451	\$107,277	\$109,655
Employment (full-year jobs)	1.6	1.6	1.6
Wages and Salaries	\$71,516	\$72,070	\$73,354
Taxes (Direct)	\$42,975	\$43,141	\$43,733
<i>Federal</i>	\$26,597	\$26,687	\$26,996
<i>Provincial</i>	\$13,781	\$13,837	\$14,080
<i>Municipal</i>	\$2,597	\$2,617	\$2,657
Industry Output (Direct & Indirect)	\$296,419	\$341,565	\$405,598

9.6 Benefit-Cost Ratio

To place potential economic impacts into some useful context, these potential impacts can be compared against the costs associated with upscaling one of the community arenas to a large capacity arena with seats. This approach identifies the incremental capital cost associated with the enhancements – not the entire capital cost of the arena construction as these costs are assumed (per this report and prior recreation needs assessments) to be community recreational infrastructure. For greater clarity:

- The Benefit-Cost Ratio (BCR) is a measure of the expected benefits of a project relative to the costs, expressed generally in monetary terms.
- In a public infrastructure context, it is broadly defined as all measurable benefits including economic impact.
- The BCR is based on net present value (NPV) of benefits and costs (i.e., discounted value of future benefits over the project life less discounted costs).
- A BCR great than (>) 1 = project has value to proceed (analytically).
- The BCR is different from risk-assessment which can be part of the adjustment of future individual costs and revenues.
- The BCR includes wider economic benefits (those which can be measured).

The resulting analysis is a comparison of financial costs and benefits (or cost avoidance as the case may be). It is not capable of directly measuring the intangible factors such as the lack of even hosting capacity that persists if the decision is not to build; Indirectly, however, the assumption of lost future economic impacts, is important to consider.

The analysis identifies key capital costs including both capital costs and average annual lifecycle capital investment (regardless of whether this capital reserve is spent). These annual costs are ongoing from year 5 until such time as the building is replaced.

Two key assumptions regarding operating costs are:

1. Overall incremental increase in net operating income (NOI) for the large capacity arena with seats over and above its operation as a community arena; and
2. Carrying the full cost of community ice which is not available as a result of the large capacity arena being commissioned for events (even while a number of these are participatory events for the community as opposed to commercial spectator events). We have aggressively assumed that fully one quarter of the prime time ice will be unavailable and should be carried as a cost.

Exhibit 41: Assumptions for Benefit Cost Ratio Assessment

Metric	Assumption
Incremental Construction Cost for Large Capacity Arena Infrastructure	ASSUMED \$20 million for purposes of analysis.
Annual Lifecycle Capital Investment	2% of Original Capital Cost + Annual Escalation. Commences Year 5 to Year 30 inclusive.
Length of Analysis	30 years + application of 10% CAP Rate for year 31 +.
Annual Incremental Deficit Attributable to Operation of Large Capacity Arena (over and above assignable costs as a community rink)	\$250,000
Loss of Community Access (as a cost)	25% of Bookable Ice Time (September to April). Expressed as cost of ice production - PRIME TIME ONLY.
Annual Economic Impact to Airdrie and Immediate Surrounding Region	Based on 1 signature event; three minor sport tournaments (net additional to Airdrie) and one trade show.

The annual economic impact is not an aggressive assumption at this time and excludes any impact arising from the operation of a hockey franchise from this building. Compared with other types of bid or rotational provincial or national events (which have been classed as special events) regular hockey games during the season at the AJHL or similar level are not likely to generate as significant an impact on an event by event basis. However, over the course of a season and particularly in the case of play-off runs, the cumulative economic benefits are noticeable.

Depending on the terms of a license agreement between the City and an AJHL or other team, it is also possible that the operations of the team at the building may add revenues to the City which serve to reduce the operating cost associated with the large capacity arena. However, our experience of other municipal arenas that host AJHL teams suggests that the license agreements or rental agreements for use of the facilities are reflective of particular circumstances relevant to that particular community. This means that it is not possible to conclude that a hockey franchise will result in revenues to the arena that actually reduce the overall facility deficit. For this analysis we have assumed a cost associated with the loss of community access to ice but do not include any offsetting license agreement fees or net concession revenues.

Without the presence of an existing team, it is a speculative venture to establish costs and revenues and the net position arising for the facility. Hence it is appropriate to exclude it at this stage but note that should a team become a primary tenant, their impact is likely to enhance the economic benefits associated with the facility.

Based on our identification and quantification of costs and revenues, these are presented below.

Exhibit 42: Benefit Cost Ratio Assessment Outcomes

Net Present Value (NPV)	Construction Phase			Operational Phase						CAP Rate		
	Year			Year								
	1	2	3	1	5	10	15	20	25		30	10%
	\$'000s			\$'000s								
Initial Capital Cost + Lifecycle	(\$27,481)	(\$6,667)	(\$6,667)	(\$6,667)	(\$509)	(\$604)	(\$718)	(\$853)	(\$1,013)	(\$1,203)	(\$12,027)	
Operational Subsidy Per Annum	(\$5,284)	\$0	\$0	\$0	(\$250)	(\$287)	(\$341)	(\$405)	(\$481)	(\$571)	(\$678)	(\$6,780)
Cost of Unavailable Community Ice	(\$3,847)	\$0	\$0	\$0	(\$182)	(\$209)	(\$248)	(\$295)	(\$350)	(\$416)	(\$494)	(\$4,936)
Economic Impact Per Annum (Direct, Indirect and Induced)	\$39,378	\$0	\$0	\$0	\$660	\$2,217	\$2,634	\$3,128	\$3,715	\$4,412	\$5,240	\$52,403
Discount Rate	6%											
Escalation Rate	3.50%											
Capital Cost	(\$20,000)											
Econ Impact Ramp Up	33% 3 Years to Full Impact Potential											
Econ Impact Normalized	\$2,000 By Year 3											
BCR	Cost (\$'000s)	(\$36,612)										
	Rev (\$'000s)	\$39,378										
	Ratio	-1.08										

Even with a full accounting of capital costs and a more modest assessment of revenues in the form of economic impact, the project registers a positive benefit-cost ratio. This is indicative of the strong potential associated with this project, and the City of Airdrie, if conceived of as an enhancement (or upscaling) of community infrastructure in response to the market opportunities for event hosting and sport tourism.

10 Recommendations

10.1 Confirmation of Approach

Based on the foregoing research, analysis, and opinion, we recommend that the City of Airdrie give some further consideration to the following adjustment of its approach to phasing:

- The development of both the Phase 1 aquatics centre and a twin pad arena complex as part of Phase 1 would be the ideal approach.
- Both core uses will be required in the immediate period ahead, and the rinks by the end of the decade such that splitting up the project by phase may not be the most appropriate approach. At the very least, a detailed assessment of the option for building an aquatics-rink complex is warranted.
- We would point out that this should not mean the deferral of the event hosting capability of an arena. On the contrary whenever the rinks are initiated, the development of the large capacity arena is paramount. It is not, in the context of the growth of the City, considered a luxury recreational or tourism item – it is appropriate infrastructure development (of an incremental nature) to serve residents and the City’s economic development objectives.
- We do not support the idea of a four-pad complex on the site with a delay in development until the aquatic facility is operational. Committing to a four-pad complex early would mean over-building at the outset but this could be achieved through a public-private partnership as long as the City is willing to separate out the rinks from the concept of a multi-use community centre. Delaying a four pad until after the 2032 period would likely create a significant reduction in the level of service offered by the City in its rinks.
- If the City is unable to support the short-term development of additional rinks, an alternative delivery model may have merit. To do so however, would, in our view, relegate a prospective large capacity arena to a lesser priority as private developers would be less supportive of taking on additional capital and operating risk, or pursuing a mandate set by the City for developing a presence in the event market. This model may also not support the development of a hockey franchise as easily as would be the case in a municipally owned facility.

10.2 Site-Related Design Work

The City is understood to be in the process of commissioning a site plan for the proposed Southwest Recreation Facility. We recommend that the findings of this report be used as input to that process in the following manner:

- Development option for a twin-pad (one of which is the large capacity arena design).

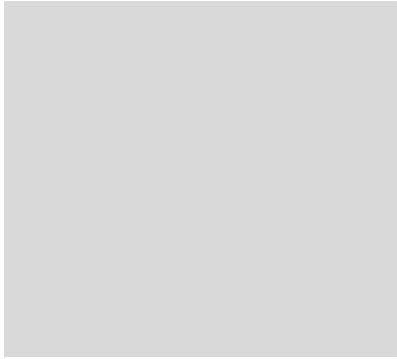
- Development option for a four-pad (one of which is the large capacity arena design).
- An assessment of the parking land take requirements with specific regard to the large capacity arena.
- An assessment of the merits of developing the twin-pad option as a single-phase project with aquatics.

10.3 Detailed Business Planning and Link to City Sports Tourism Strategy

This report is necessarily strategic in nature rather than providing specific assessment of capital cost, operating risk, and projections of event capacity. Once the site planning assessment is complete, we recommend that a concept plan is developed for the arenas phase that establishes more precisely the functional space plan and potential ranges of capital cost.

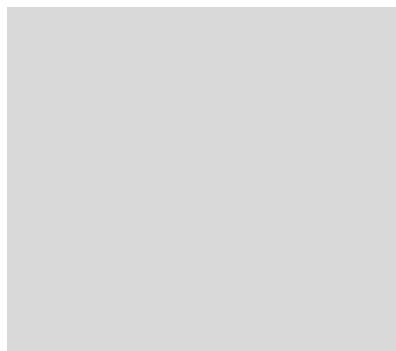
The market opportunity for a large capacity arena is apparent – the design parameters and their cost are the next most significant items to address. Separately, the overall market potential should also be vested in a municipal sport tourism strategy, which itself can shed further light on municipal priorities and benefits from ensuring that the next generation of community rinks are scaled to capture hosting opportunities.

Should the City see merit in a Phase 1 project that combines aquatics and arena development, a more detailed development feasibility exercise is warranted.



Appendix A:

Type of Events Held at Arenas with Between
2,000 to 2,999 Fixed Seats



Type of Events Held at Arenas with Between 2,000 to 2,999 Fixed Seats

Arena	City	Province / Territory	Seats (Hockey)	Major Tenant (Hockey Unless Stated)	Est. Year Constructed	Events Using Rink Arena (Based on Online Research Only)	Other Comments
Brantford Civic Centre	Brantford	Ontario	2,981	Brantford Blast	1967	No arena calendar online listing past special events. A review of Municipality and Tourism-related webpages, and a wider Google search for the venue, indicate only occasional non-ice special events are hosted (e.g. Sept to Dec 2018 includes Psychic Expo and Dog Show).	Local media indicates that the Municipality is considering options for renovation if there is a future OHL team.
Credit Union Iplex	Swift Current	Saskatchewan	2,879	Swift Current Broncos	1967	No arena calendar online listing past special events. A review of Municipality and Tourism-related webpages, and a wider Google search for the venue, indicate only occasional non-ice special events are hosted (Southwest Showcase Rodeo and tradeshow).	The 'Tourism Swift Current' website identifies that that non-ice special events are typically hosted at other venues e.g. conferences, concerts and trade shows (Living Sky Casino Centre, Lyric Theatre etc).
William Allman Memorial Arena	Stratford	Ontario	2,828	Stratford Cullitons	1924	No arena calendar online listing past special events. A review of Municipality and Tourism-related webpages, and a wider Google search for the venue, have not identified any non-ice special events being hosted at this venue.	City's Downtown website identifies that non-ice special events are typically hosted at other venues (e.g. City Hall Auditorium, theatres, Stratford Rotary Complex, Burnside Agriplex, etc.).
Miramichi Civic Centre	Miramichi	New Brunswick	2,805	Miramichi Timberwolves	1986	No arena calendar online listing past special events. A review of Municipality and Tourism-related webpages, and a wider Google search for the venue, identify that the arena does hold some non-ice special events, including trade shows and a Folk Festival.	The venue hosts community-focussed special events, but there are few other large event spaces in close proximity.
Colisee de Trois-Rivieres	Trois-Rivieres	Quebec	2,800	Blizzard, UQTR Patriotes	1938	No arena calendar online listing past special events. A review of Municipality and Tourism-related webpages, and a wider Google search for the venue, have not identified any non-ice special events being hosted at this venue.	There are other venues which special events space in City (theatres, amphitheatre etc). Online media reports suggest arena is to be replaced by new 'Mega Complex'.
The Q Centre	Colwood	British Columbia	2,781	Victoria Grizzlies	2004	Forms part of the Juan de Fuca Recreation Centre. Ice and lacrosse venue. Arena website identifies that venue started being offered as a concert space in 2014. Alice Cooper performed on two-date Canadian tour in 2016. However, no online evidence of this being a regular non-ice event venue.	Save On Foods Memorial Centre is the principal special event venue in local area for concerts and trade shows (7,500 seats)
Centre Henry-Leonard	Baie-Comeau	Quebec	2,779	Baie-Comeau Drakkar	1970	No arena calendar online listing past special events. A review of Municipality and Tourism-related webpages, and a wider Google search for the venue, have not identified any non-ice special events being hosted at this venue.	n/a
Selkirk Recreation Complex	Selkirk	Manitoba	2,751	Selkirk Steelers	1992	City's online event calendar identifies that non-ice events hosted are generally community-related. Upcoming events include: Fall Recreation & Leisure Fair, 39th Interlake Juried Art Show, Christmas Festival & Craft Sale, Blood Donor Clinic.	Other large community events are in summer months and principally outdoors on Waterfront (e.g. Music Festival, Rodeo, etc).
Clare Drake Arena	Edmonton	Alberta	2,700	University of Alberta Golden Bears & Pandas Varsity Athletics	1959	University's website identifies that arena is used principally for varsity sports, campus and community-related programming. No information on non-University related events available online.	Many other special event venues available in Edmonton
Colisee Jean Beliveau	Longueuil	Quebec	2,600	Longueuil College Francais	1968	No arena calendar online listing past special events. A review of Municipality and Tourism-related webpages, and a wider Google search for the venue, have not identified any non-ice special events being hosted at this venue.	n/a
St Thomas-Elgin Memorial Centre	St Thomas	Ontario	2,600		1953	No arena calendar online listing past special events. A review of Municipality and Tourism-related webpages, and a wider Google search for the venue, have not identified any non-ice special events being hosted at this venue.	London is 30 min drive time to north and offers a variety of special event venues.
West Central Events Centre	Kindersley	Saskatchewan	2,600	Kindersley Clippers	Unknown	No arena calendar online listing past special events. A review of Municipality and Tourism-related webpages, and a wider Google search for the venue, have not identified any non-ice special events being hosted at this venue.	Rural setting with under 5,000 population.

Arena	City	Province / Territory	Seats (Hockey)	Major Tenant (Hockey Unless Stated)	Est. Year Constructed	Events Using Rink Arena (Based on Online Research Only)	Other Comments
Mattamy Athletics Centre	Toronto	Ontario	2,539	Ryerson Rams	2012 (renovation)	The facility website shows that the Downtown Toronto arena forms part of a University complex that serves the sports teams but is also offered as an event and conference venue.	University arena. Part of sports complex in Downtown location, which also include a 1,000 fixed seat basketball arena.
Arctic Winter Games Arena	Iqaluit	Nunavut	2,500		2001	No arena calendar online showing past special events. Municipality's website identifies that the arena is principally for ice-related events, but occasionally used for other activities, including public soccer.	n/a
Centre Mario Gosselin	Thetford Mines	Quebec	2,500	Thetford Mines Isothermic	1964	No arena calendar online showing past events. A review of Municipality and Tourism-related webpages, and a wider Google search for the venue, identify that the venue occasionally holds conventions and expos (e.g. dog show, arts festival, etc).	Principal local concert venue is Salle Dussault Theatre (630 seats).
Amherst Stadium	Amherst	Nova Scotia	2,500	Amherst Ramblers	1959	Municipality's online events calendar indicates non-ice events generally limited to small-scale, focussed on local community.	Many large community events are in the summer months and outdoors (e.g. in Victoria Square).
Dave Andreychuk Mountain Arena	Hamilton	Ontario	2,500	Hamilton Steelhawks	1966	No arena calendar online listing past special events. A review of Municipality and Tourism-related webpages, and a wider Google search for the venue, have not identified any non-ice special events being hosted at this venue.	City of Hamilton has many other indoor spaces to cater for non-ice events.
EnCana Arena	Camrose	Alberta	2,500	Camrose Kodiaks	2007 (expansion)	No arena calendar online showing past special events. A review of Municipality and Tourism-related webpages, and a wider Google search for the venue, have not identified any non-ice special events being hosted at this venue.	Municipality's website refers to the arena being suitable for concerts. However, in calls with venue staff, it was indicated that there is a performance centre in Camrose which hosts major events and concerts. Corroborated by our online research.
North Battleford Civic Centre	North Battleford	Saskatchewan	2,500	Battleford North Stars	Unknown	No arena calendar online showing past special events. A review of Municipality and Tourism-related webpages, and a wider Google search for the venue, has identified that the venue hosts some non-ice special events (e.g. annual Kinsmen Indoor Rodeo, circuses, concerts, dining, and dance functions)	Local media reporting that options being considered for replacing arena with twin-pad (3,000 seats and 600 seats being considered).
Centre Sportif Lacroix-Dutil	Saint-Georges	Quebec	2,476	Saint-Georges Cool FM 103.5	1968	No arena calendar online showing past special events. A review of Municipality and Tourism-related webpages, and a wider Google search for the venue, has identified that the venue does host non-ice special events, including 'Legends of Rock' and expos.	n/a
Chatham Memorial Arena	Chatham	Ontario	2,412	Chatham Maroons	1949	No arena calendar online listing past special events. A review of Municipality and Tourism-related webpages, and a wider Google search for the venue, have not identified any non-ice special events being hosted at this venue.	Online research suggest that the Municipality has in recent years been considering building a new home for junior hockey at St Claire's College (5,000 capacity), but no decision has been made.
Centre Sportif Leonard-Grondin	Granby	Quebec	2,385	Granby Inouk	1968	No arena calendar online listing past special events. A review of Municipality and Tourism-related webpages, and a wider Google search for the venue, have not identified any non-ice special events being hosted at this venue.	n/a
Markham Centennial Centre	Markham	Ontario	2,300	Markham Royals	1972	No arena calendar online listing past special events. A review of Municipality and Tourism-related webpages, and a wider Google search for the venue, have not identified any non-ice special events being hosted at this venue.	Preferred non-ice event venues include Markham Pan Am Centre.
Antigonish Arena	Antigonish	Nova Scotia	2,290	Antigonish Bulldogs		No arena calendar online listing past special events. A review of Municipality and Tourism-related webpages, and a wider Google search for the venue, has identified that non-ice events are limited to local community events, including annual agricultural exhibition. Arena calendar for next 12 months shows only sporting events.	n/a

Arena	City	Province / Territory	Seats (Hockey)	Major Tenant (Hockey Unless Stated)	Est. Year Constructed	Events Using Rink Arena (Based on Online Research Only)	Other Comments
Pembroke Memorial Centre	Pembroke	Ontario	2,250	Pembroke Lumber Kings	1952	Municipality's events calendar available but doesn't show many special events hosted at the arena. A review of Municipality and Tourism-related webpages, and a wider Google search for the venue, has identified that the venue hosts music concerts (Dean Brody, Jason Blaine etc) on tour circuit.	n/a
Eastlink Events Centre	Clarenville	Newfoundland & Labrador	2,240	Clarenville Caribous	2009	A review of Municipality and Tourism-related webpages, and a wider Google search for the venue, has identified that this to be a venue for non-ice events, including concerts, expos and festivals, but for community and surrounding settlements.	n/a
Centre Etienne Desmarteau	Montreal	Quebec	2,200	Les Canadiennes	1976	No arena calendar online showing past special events. A review of Municipality and Tourism-related webpages, and a wider Google search for the venue, have not identified any non-ice special events being hosted at this venue.	n/a
Poirier Sport & Leisure Complex	Coquitlam	British Columbia	2,200	Coquitlam Express	2010	No arena calendar online showing past special events. A review of Municipality and Tourism-related webpages, and a wider Google search for the venue, have not identified any non-ice special events being hosted at this venue.	n/a
Cowichan Valley Arena	Duncan	British Columbia	2,040	Cowichan Valley Capitals	1978	No arena calendar online showing past special events. A review of Municipality and Tourism-related webpages, and a wider Google search for the venue, have not identified any non-ice special events being hosted at this venue.	Main venue for concerts is Cowichan Performing Arts Centre.
Woodstock District Community Complex	Woodstock	Ontario	2,000	Woodstock Navy Jets	1996	Municipality's event calendar identifies that special events are normally targeted at the local community and are held in a variety of small indoor venues across Woodstock. A review of Municipality and Tourism-related webpages, and a wider Google search for the venue, have not identified any non-ice special events at this venue.	City-hosted special events listed on the Municipality's website are predominantly outdoors.
Arena Marcel Bedard	Beauport	Quebec	2,000		1973	No arena calendar online listing past special events. A review of Municipality and Tourism-related webpages, and a wider Google search for the venue, have not identified any non-ice special events being hosted at this venue.	n/a
Bill Copeland Sports Centre	Burnaby	British Columbia	2,000	Burnaby Lakers (lacrosse)	1997	No arena calendar online listing past special events. No regular non-ice events advertised online. A Google search for the venue identifies that it has previously hosted the Juno Cup, Word Junior Taekwondo Championship, Family Day Winter Festival.	n/a
Jim Peplinski Arena	Ottawa	Ontario	2,000	Ottawa Junior Senators	1963	No arena calendar online listing past special events. A review of Municipality and Tourism-related webpages, and a wider Google search for the venue, have not identified any non-ice special events being hosted at this venue.	One part of a larger leisure and recreation complex (Jim Durrell Recreation Centre), which includes another arena (Walkley).
Whitney Forum	Flin Flon	Manitoba	2,000	Flin Flon Bombers	1958	No arena calendar online listing past special events. A review of Municipality and Tourism-related webpages, and a wider Google search for the venue, have not identified any non-ice special events being hosted at this venue.	n/a
Winkler Arena	Winkler	Manitoba	2,000	Winkler Flyers	1967	Online Arena event calendar identifies that the majority of bookings are ice-related. The few special events there are per year are focussed on the local community (e.g. Police bike auctions, junior rifle championship, Chamber of Commerce business events, Harvest Festival, etc).	n/a

Note: Excludes University arenas and those which after further online investigation are not existing hockey venues.

Sources: Google Search Engine, Wikipedia (October 2023).