



Township of Wilmot

Indoor Arena Ice Usage and Needs Analysis

October 2013



Monteith Brown
planning consultants



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Prepared by:



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1.0 Introduction

1.1 Overview

In 2007, the Township of Wilmot prepared an Addendum to its 2002 *Recreation Facility Needs Study*. This Addendum reassessed directions related to the provision of indoor recreation facilities, most notably arenas and aquatics facilities. The timing of the 2007 Addendum generally coincided with the opening of the first phase of the Wilmot Recreation Complex (which consisted of a twin pad arena) and the eventual transfer of ice activities away from the old New Hamburg Arena (which was re-purposed to non-ice activities and special events, as directed by Township Council).

The 2002 and 2007 studies provided the Township with both short term and long range planning objectives to meet the current and future recreation needs. With an opportunity to renovate a portion of the old New Hamburg Arena, it has come time to review the current and future need for ice surfaces in Wilmot.

The purpose of this *Indoor Arena Ice Usage and Needs Analysis* is to reassess the timing of future ice surface provision within the Township by updating the ice surface component of the 2007 Recreation Facility Needs Study Addendum. The following objectives have been established for this project:

- Assess trends in ice surface demand (locally, regionally, and beyond) and contributing factors
- Consider trends in local ice sport participation, as well as community demographics
- Evaluate changes in utilization of Township of Wilmot ice surfaces since the Wilmot Recreation Complex opened (2007)
- Gather input from major local ice sport organizations regarding current and future demand
- Project future ice surface demand based on the items above, including timing of anticipated need for a third municipal ice surface

It is anticipated that the findings of this Study will be used by the Township to develop a strategy for the provision of future municipal ice surfaces. Specifics relating to the location, design, cost, and form of management for a third ice pad are beyond the scope of this Study.

1.2 Previous Studies

In October 2002, the Council of the Township of Wilmot endorsed the *Recreation Facility Needs Study* prepared by Monteith Planning Consultants. With the assistance of an extensive public consultation program, this Study identified the need and feasibility for a multi-use recreation complex containing a variety of indoor and outdoor components and also included a site evaluation process. The 2002 Study recommended the following in relation to arena infrastructure:

- 1) "...the Township needs to immediately plan for the development of a new ice pad which should be designed for long-term twinning to accommodate the ultimate replacement of the New Hamburg Arena...when the existing [New Hamburg] arena needs major capital works, replacement of the facility by twinning the new arena should be carried out (current estimates suggest a 15-year time frame)..."

Land was subsequently acquired at the northeast corner of Highway 7/8 and Nafziger Road and the Wilmot Recreation Centre was constructed in two phases (Phase I, 2008 – twin pad arena, multi-purpose and activity rooms, offices; Phase II, 2012 – indoor aquatic centre, active living centre, youth centre, indoor track, multi-purpose and activity rooms). Township Council made the decision to include a twin pad arena in the initial phase (rather than wait to twin at a later date) and to re-purpose the New Hamburg Arena to non-ice activities and special events once the new twin pad was up and running.

As the first phase of the Wilmot Recreation Centre was nearing completion, the Township again engaged Monteith Brown Planning Consultants reassess recreation facility needs, with a focus on indoor components. The 2007 Addendum recommended the following in relation to arena infrastructure:

- 1) "That the New Hamburg Arena be re-purposed for another use.
- 2) When 2.25 to 2.5 ice pads are required to meet current demand (1,688 to 1,875 participants) and 3.0 ice pads are required in the future (2,250 participants), that the Township undertake a financial feasibility study to determine the capital and operational costs associated with developing a third ice pad and a site selection process assessing:
 - The Wilmot Multi-Use Recreation Facility (subject to MTO land needs resolution);
 - At an alternative site (to be determined); or
 - By refurbishing/reconstructing the New Hamburg Arena."

The first recommendation – removal of ice and repurposing the New Hamburg Arena – has been achieved. This study will assist the Township with implementation of the second recommendation by assessing current and projecting future participation levels. At the time of the 2007 Addendum, it was determined that ice surfaces requirements were equivalent to 1.8 ice pads and that a third ice pad would not be warranted until at least 2016.

2.0 Community Profile

2.1 Existing and Forecasted Population

The age profile of a community is an important indicator of its recreational demands, and offers guidance to the types of facilities that should be offered. For example, a community with a high proportion of children and youth may have higher demand for competitive sports such as hockey or skating, while a community with a higher proportion of older adults may require facilities that offer less intensive forms of exercise.

The Township of Wilmot's 2011 Census population was listed as 19,240 and the **2012 year-end estimate is 20,110**. Wilmot has been experiencing relatively high growth rates over the past ten years, having grown by 29% during that span. Positive growth is expected to continue into the future – a 47% population increase is forecasted over the next twenty years (**28,250 residents by 2031**); note: all figures exclude Census undercount. This translates into an average growth of 450 residents each year over the next twenty years, although growth is likely to fluctuate from year to year depending on various factors. In fact, growth rates are anticipated to be lower over the next five years due to sewage capacity constraints, which the Region of Waterloo anticipates to have resolved by 2017/18. There have been no new plan of subdivision approvals in Wilmot since summer 2009 and recent growth has been achieved through infill development and build-out of existing subdivisions.

The population forecasts for the Township of Wilmot are derived from the Region of Waterloo's Official Plan, which is currently under appeal. Until the regional land supply and allocation issues are resolved, this data remains subject to change. The intervening years between 2011 and 2031 (i.e., 2016, 2021, and 2026) show relatively smooth, steady growth rates; however, there could be considerable deviation over these time frames due to municipality-specific growth opportunities or constraints which are not captured in this model.

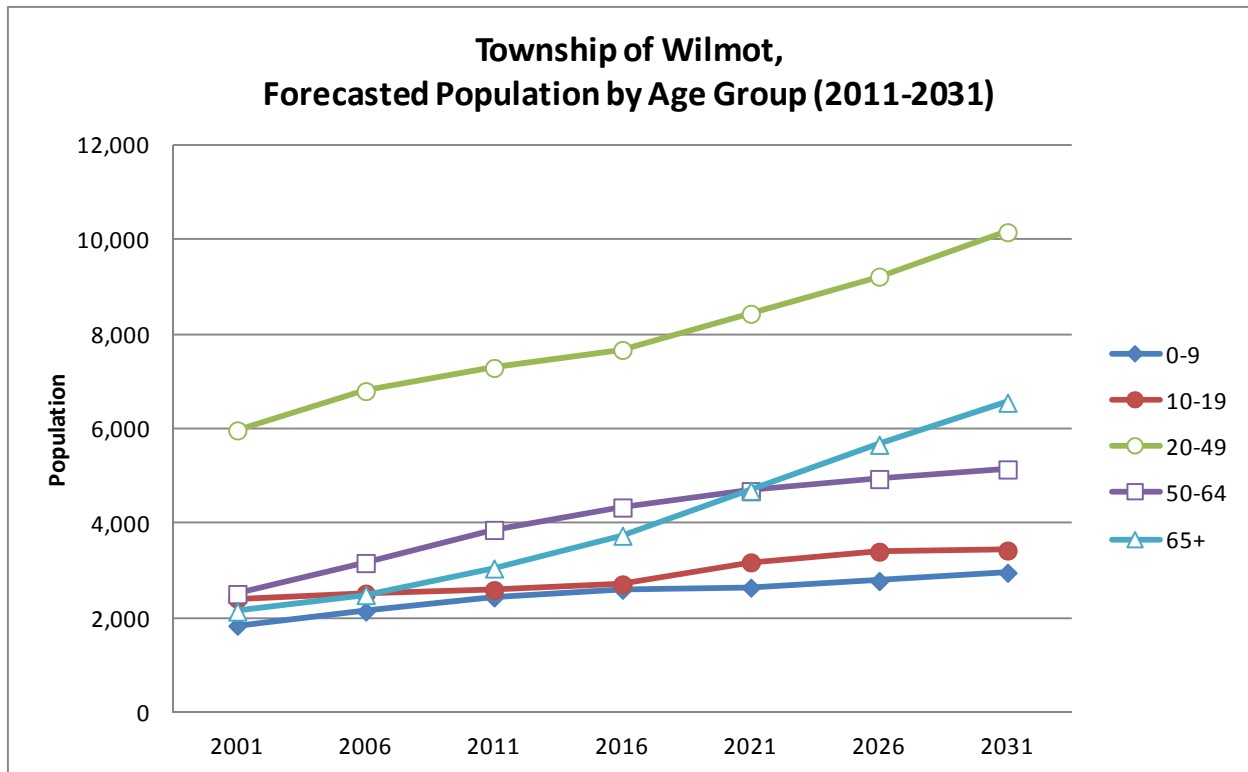
The following table and figure illustrates the current and forecasted age composition of Wilmot's population. The age cohort forecasts provided by the Region of Waterloo suggest that despite the continued aging trend, positive growth is anticipated in every age category.

Township of Wilmot – Forecasted Population by Age Group (2011-2031)

	2011	2016	2021	2026	2031	Change, 2011-2031	
	(Census)	(Forecast)	(Forecast)	(Forecast)	(Forecast)	#	%
0-9	2,440	2,600	2,645	2,785	2,960	520	21%
10-19	2,595	2,715	3,180	3,405	3,430	835	32%
20-49	7,290	7,670	8,435	9,220	10,160	2,870	39%
50-64	3,865	4,340	4,685	4,940	5,145	1,280	33%
65+	3,050	3,745	4,695	5,665	6,555	3,505	115%
Total	19,240	21,070	23,640	26,015	28,250	9,010	47%

Source: Planning Information and Research, Regional Municipality of Waterloo, 2013

Note: excludes Census undercoverage



Source: Planning Information and Research, Regional Municipality of Waterloo, 2013

Note: excludes Census undercoverage

The Township’s entire population increased by 12% between 2006 and 2011, but the 5 to 19 age cohort increased by only 5%, suggesting that Wilmot’s population is aging. The median age of residents in Wilmot was recorded at 40.4 years through the 2011 Census, identical to the provincial median. The Township’s population is following national aging trends as the median age has increased by 1.9 years between 2001 and 2011.

These trends are likely to have notable implications on local ice demand between 2011 and 2031:

- Despite positive overall growth, the proportions of children (ages 0-9) and youth (ages 10-19) as a percentage of the entire population are forecasted to decline from 13% and 13% to 10% and 12% respectively. This suggests that ice demand from this major market segment will continue to rise (barring any potential declines in participation rates), but that this growth will occur at a slower pace than the Township’s overall growth rate.
- The proportions of younger adults (ages 20-49) and older adults (ages 50-64) are also forecasted to decline slightly, despite positive overall growth. Assuming steady participation rates, this suggests that the adult ice market is likely to continue to grow, but at a slower pace than the Township’s overall growth rate.
- The proportion of seniors (ages 65+) is expected to increase from 16% of the 2011 population to 23% of the 2031 population, or approximately 3,505 more residents. This may create modest additional demands for ice activities aimed at the seniors’ market (e.g., old timer leagues, huff’n’puff skating, etc.).

In comparing the projections used in the 2007 Addendum, it should be noted that the current forecast model results in a slightly less aggressive projection of growth and a modestly accelerated aging trend, which may have additional implications on ice surface demand; this is explored further in Section 5.0.

2.2 Other Socio-Demographic Considerations

Research shows that income levels also influence (or at least are an indicator of) participation levels in recreation and leisure. Generally speaking, the greater a person's level of income, the more likely they are to participate in such activities as they typically have the means and motivation to do so. In Wilmot, the 2006 Census data indicates that median employment income for adults 15 years was \$32,612, which was 11% above the Regional median and 20% above the Provincial median (note: 2011 income data from the National Household Survey will not be released until mid-August 2013). This data suggests that, on the whole, Wilmot's population is generally in a position to afford the costs typically associated with organized ice sports. Many municipalities and organizations across the province have established (or have access to) subsidy programs to financially assist those that cannot afford the full cost of registration in youth sports; sports subsidies are available locally through the Township and many area organizations.

Participation in and accessibility of recreation opportunities is also often impacted by immigration and diversity levels. Based on estimates from the 2011 National Household Survey¹, the Township has a lower percentage of immigrants (10%) than the Region of Waterloo (22%) and considerably less than the Province (29%). Only 11% of Wilmot's immigrant population arrived in Canada since 2001 and 70% of the immigrant population is of European descent. This data suggests a high level of homogeneity in the population which is indicative of strong participation in traditional Canadian ice sports.

¹ The National Household Survey was a voluntary, self-administered survey conducted for the first time in 2011 as a replacement for the long census questionnaire. Due to the survey methodology, the Township of Wilmot data has a non-response rate of 29.3%, which may affect data quality.

3.0 Ice Sport Participation Trends

Based on our experience doing similar studies throughout Ontario, this section provides an overview of some of the key trends and best practices pertaining to ice sport participation. Where applicable, potential implications for the Township of Wilmot have been noted.

3.1 Barriers to Participation

Research across Ontario shows that a lack of free time – driven by busy lifestyles at home, work, and school – is the primary barrier to participation in recreation for youth and adults. There are significant time commitments associated with most ice sports, including weekly practices and games, tournaments, and potentially travel to other centres. However, there is an increasing willingness to travel for high quality facilities and programs.

Ice sports also face heavy competition from other sports and sedentary activities and there is also a growing emphasis on spontaneous, non-programmed activities that can be scheduled at the last minute – this profile does not align well with organized ice sports. More and more children and youth are seeking non-recreational forms of activity altogether (e.g., video games), which leads to increasing rates of obesity and inactivity. The proportion of obese children increased threefold between 1981 and 2006² while less than half of all Canadian children are active enough to achieve optimal growth and development (adults have similar percentages). Participation in physical activity (including skating, hockey, and drop-in and organized activities offered at local arenas) can assist in addressing this issue.

Although Hockey Canada is making changes to programming to eliminate body-checking from younger and less competitive levels, concerns over player safety (e.g., concussions) are growing and may cause some to pursue other activities or opt-out from the sport at an earlier age.

Level of income can also be a significant barrier to participation in recreation, particularly in higher cost sports, as studies have correlated higher household income to higher participation rates due to a greater ability to pay. For hockey, costs can be intensive, particularly for rep level play where household expenditures on registration fees, equipment, and travel are much higher than at the house league level. According to an article published by CBC Sports, cost could be the most pressing problem facing hockey at the grassroots level, with a senior Hockey Canada official stating that cost plays a significant role in the stagnant or declining registration numbers faced by many minor hockey associations.³ Many local organizations offer informal financial assistance programs and also have access to initiatives such as Canadian Tire Jumpstart.

² Health Canada and the Public Health Agency of Canada. (2006). It's Your Health.

³ Rutherford K. Is the cost keeping kids out of minor hockey? Absolutely, players and parents say. CBC Sports. Available online at www.cbc.ca/sports/hockey/ourgame/story/2009/01/16/hockey-costs-too-much.html

3.2 The Impact of an Aging Population

Across Ontario and Canada, the average age of the population is becoming older as the populous 'Baby Boom' generation moves through their lifecycle. The number of seniors aged 65 and over is projected to double from 1.9 million in 2011 (representing 14% of the population) to 3.8 million by 2031 (representing 23% of the population). After 2031, the growth in seniors will slow significantly. This trend is also anticipated in the Township of Wilmot.

The implications of an aging population on indoor ice utilization are potentially significant. On one hand, there may be new opportunities to utilize ice in non-prime time hours due to the growing market of older adults who may make use of daytime ice for dedicated skating times and hockey leagues. On the other hand, an aging population also means that the child and youth market, the most common users of ice arenas, is shrinking (in terms of proportion and number), which in turn may reduce the number of ice users in total. While the number of children and youth in Wilmot are anticipated to continue to grow, the increase will not be at the same pace as the rest of the population.

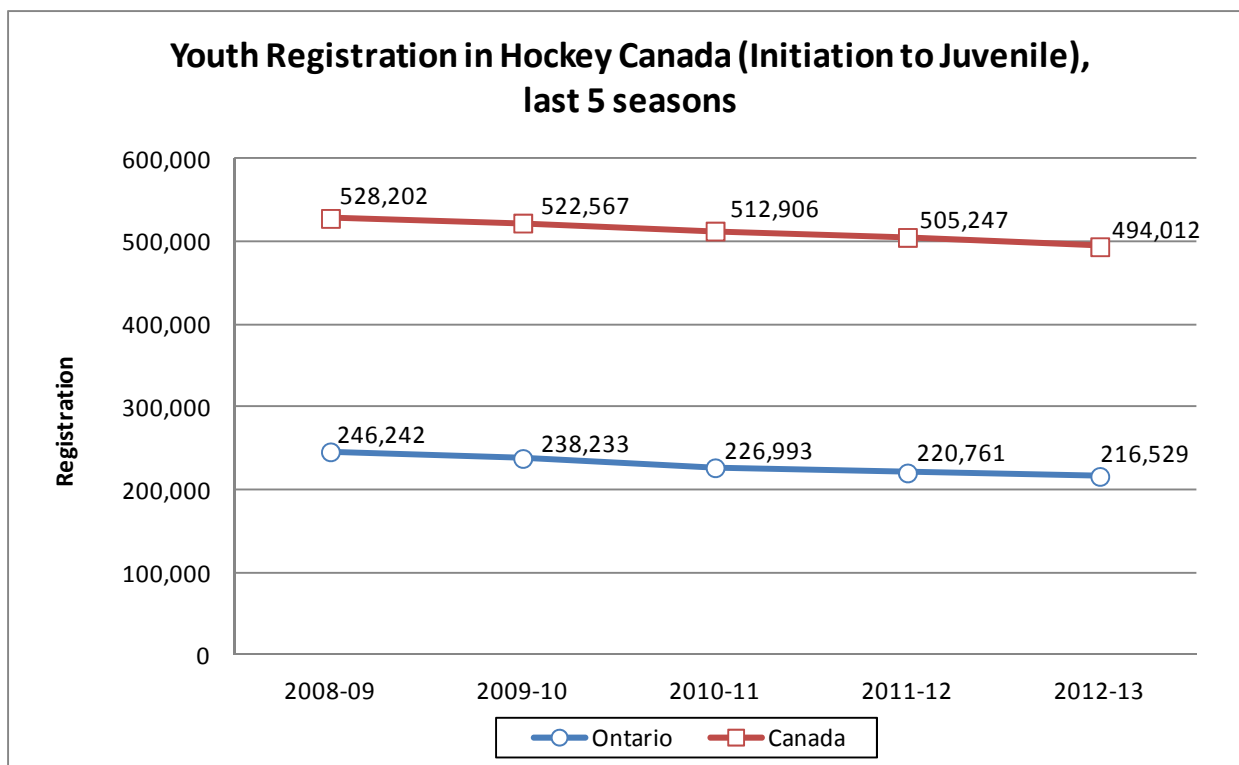
3.3 Changes in Hockey Registration

For many of the reasons noted above, over the course of the last few decades, several organized sports have witnessed declines in participation. Participation in many sports is also being impacted by immigration – many new Canadians are coming from countries in which ice hockey is not often played, thus affecting participation rates at the minor level.

Changes in hockey registration are notable:

- 9% of Canadian children and youth play hockey, half the percentage that played 20 years ago. The size of Ontario's 5 to 19 age group increased by only 0.4% between 2001 and 2011, despite the entire population growing by 12.6%.
- Hockey Canada and the Ontario Hockey Federation experienced peaks in youth registration for the 2008-2009 season. Registration has declined by 12% in Ontario since this time, a time period that coincides with the economic downturn and very slow youth population growth. Registration remains strongest in the younger age groups (Initiation, Tyke, Novice), while the Atom to Midget age groups have seen the greatest declines.
- Female hockey participation in Ontario also peaked in 2008/09. In the ten years prior to 2008/09, female hockey registration increased nearly four-fold and made-up for a reduction in male registration. Female hockey participation has declined slightly since, suggesting that the market has reached equilibrium. In 2012/13, females comprised 32% of all youth hockey registrants in Ontario.

Similarly, Skate Canada (the national governing body for figure skating) has also experienced a slow decline in registration, with the number of associate members declining by 9% between 2006/07 and 2012/13 (source 2013 Skate Canada Annual Report). Synchronized skating and power skating programs have seen the greatest increases in recent years.



Source: Hockey Canada Annual Reports

3.4 Demand for Prime Time Ice

Despite declining registration levels and ice rentals, the most desirable prime time hours consistently remain in high demand in most municipalities; these times are usually between 5pm and 11pm on weekdays and all day on weekends. Wilmot’s prime time hours are very well utilized, primarily by youth-serving organizations.

However, with more households facing time constraints, there is evidence of a shrinking “window” of desirable ice times and more competition for prime time rental slots. In some communities, declining registrations have adversely affected bookings during “shoulder” hours that fall just outside of the prime times (e.g., 6 to 8am, 4 to 5pm, and 10pm to 12am). With Wilmot being a growth municipality, this situation has not presented itself, but it may be affecting some less populated rural communities in the area. As a result, it is possible that some arenas in nearby municipalities may have more ice times open up over time, allowing for outside rentals from groups in Wilmot and beyond.

Daytime (weekday) usage during non-prime hours has traditionally been difficult for most municipalities to sell and this is no different in Wilmot. Most communities undertake ice maintenance during this time, offer a variety of public skating programs, rent ice to local schools, and pick-up the occasional adult group rental. However, many communities are experiencing declining school board utilization due to rising busing costs and changes to the physical education curriculum.

To help boost non-prime usage, some municipalities are offering seniors-only and adults-only drop-in skating, adult shinny, and parent and tot shinny and drop-in skating. Hockey leagues for older adults 55+ are also beginning to emerge in a variety of communities. Other municipalities are choosing not to

staff stand-alone arenas during the daytime, instead opening them up at 4pm in the afternoon on weekdays.

3.5 Increased Focus on Skill Development and Competition

Ice sport governing bodies in Canada are now implementing a Long-Term Athlete Development model that emphasizes athlete growth, maturation and development. This model identifies the needs of athletes at various stages of their development, including training and competition needs and also addresses the appropriate stages for the introduction and refinement of technical, physical, mental and tactical skills.

As a result of this and other factors (such as the amalgamation of hockey associations and potential changes to residency requirements that will allow for greater player movement), competitive development experiences and opportunities are in high demand. The higher the level of play and the greater the focus on athlete development, the more ice time that is required for practices, games, and camps. Many organizations are altering their standards of play in order to offer their registrants more ice time during all seasons; hockey schools and other enhanced development experiences (e.g., power skating) are turning hockey into a year-round sport. While this model allows for more time on the ice, it also reduces the capacity of local arenas, which is an important consideration for facility planning.

4.0 Local Pressures & Utilization Rates

This section identifies factors contributing to local ice needs (as expressed by major user groups) and examines trends in the utilization and participation rates in Wilmot.

4.1 Pressures Impacting Ice Requirements

To assist in determining the appropriate provision of ice surfaces, input was solicited from major ice users in the Township. Consultation is an important component of this study, as it provides insight into community perceptions and attitudes regarding facility demand and current and future requirements. Locally collected data – when combined with an analysis of national and provincial trends and other factors – facilitates the critical formulation of community-specific decisions.

The following groups were consulted directly for this study; each organization completed a worksheet and participated in small group interviews:

- New Hamburg Hockey Association
- Wilmot Girls Hockey Association
- New Hamburg Skating Club
- New Hamburg Firebirds Junior C Hockey Team

The consultation was structured to solicit registration data, trends, usage profiles, and an understanding of current pressures and future needs from each of the groups. This information has been integrated into this report where appropriate and key pressures affecting ice needs are summarized below.

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

- The **New Hamburg Hockey Association** is dealing with a number of changes that are impacting ice time needs:
 - many of the rep teams are only getting one practice per week in Wilmot; to remain competitive with other centres, there is a desire to increase this to 2 practices most weeks and to offer skill development programs (note: Township staff have indicated that the club does not have a Juvenile team this season due to lack of demand)
 - in order to secure more practice time, the club estimates that its coaches are renting about 6 to 9 hours of ice per week in arenas outside of Wilmot (note: this is higher than what the club indicated to Township staff at the annual ice allocation meeting); they are paying higher rates for this ice and feel that more would be used if it were offered locally and at Wilmot rates (i.e., they could rent more ice for the same price if the rates were lower) – the group requested an additional 10 to 15 hours per week in Wilmot
 - while the group is scheduling shared practices for its younger age groups, there is a desire to ensure that this is kept to a minimum at novice and above

- to accommodate a growing number of teams, the association is scheduling games later into the evening, which is problematic for some; there is a desire for earlier ice times
 - they have recently been re-designated as an “A” Centre (formerly B, then BB), which represents a higher level of competition; the future possibility of moving to an “AA” Centre could impact ice time requirements (including the need for spring tryouts)
 - the possible removal of residency requirements by Hockey Canada has the potential to affect registration at the competitive level
- The **Wilmot Girls Hockey Association** was formed six years ago when the Wilmot Recreation Complex opened. They too are dealing with a number of changes that are impacting ice time needs:
 - the group has witnessed steady growth, particularly at the rep level, and requested an additional 5 hours per week in Wilmot to address current needs related to growth
 - they anticipate adding 6 new teams at various levels over the next five years – to accommodate this, approximately 12 to 15 additional hours per week would be required over time
 - teams are classified based on ability and the association has some that currently play at the BB level; as the organization matures, they are likely to have more teams playing at BB or above, which requires 90-minute ice times for games and translates into additional ice time requirements
 - many of the rep teams are only getting one practice per week in Wilmot; to align with Hockey Canada guidelines, there is a desire to increase this to 2 practices most weeks and to offer skill development programs
 - while the group is scheduling shared practices for house league teams and its younger rep teams, there is a desire to eliminate this for all but the younger house league teams
 - the association currently runs one annual tournament and, if ice time were available, is interested in running another one at the rep level
 - The **New Hamburg Skating Club**, not unlike many figure skating organizations, has experienced fluctuating registration over the years (2011/12 was a down year). In order to expand their existing Power Skating program and to offer a new Synchronized Skating program, the club requested an additional 2 hours per week in Wilmot. Note: A new competitive skating program was initiated in 2013/14 that may assist the Club in retaining competitive skaters over the long-term.
 - Due to changes to the league structure, the **New Hamburg Junior C Firebirds** will be adding two games to their 2013/14 schedule and doing so over a slightly condensed period of time. The possibility of further league restructuring is unknown but has the potential to create additional ice time requirements.

4.2 Demand for Additional Ice Time

Based on the stakeholder interviews, the following table identifies the number of additional hours requested through this Study by local youth groups for the upcoming season. It bears noting that the totality of these requests is significantly higher than what was requested at the annual ice allocation meeting with the Township.

Requests for Additional Hours, 2013/14 Winter Season

Organization	2013/14 Ice Allocation (weekly)	Additional Hours Requested for 2013/14 (weekly)
New Hamburg Hockey Association	65	10 to 15
Wilmot Girls Hockey Association	26.5	5*
New Hamburg Skating Club***	14.5	2
New Hamburg Junior C Firebirds	4.5	0.5**
Adult Teams / Other	23	not surveyed
Public Skating / Shinny	9	n/a
TOTAL	142.5	17.5 to 22.5 hours per week

* the WGHA also requested an additional 12 to 15 additional hours per week over the course of the coming years to accommodate a growing program

** the Firebirds will be playing additional games over a condensed season, resulting in weeks where additional hours are required – this figure is a weekly average

*** Ice allocation excludes competitive stream that began in 2013/14 and uses non-prime hours

In total, local youth-serving organizations indicate that they can utilize 17.5 to 22.5 hours of additional ice time on a weekly basis during the winter season to better accommodate their existing programs. Much of this time is likely to be allocated to additional practice time for minor hockey teams (boys and girls). Should this additional ice time be provided locally, it is likely that the New Hamburg Hockey Association would discontinue their use of outside areas (currently 6 to 9 hours per week; this forms part of their request for 10 to 15 additional weekly hours). The level at which ice rental rates are set is also likely to impact the uptake of these additional hours. It is important to note that this calculation pertains to existing youth demand levels only (adult groups were not surveyed) and does not take into account future demands, which are discussed in Section 5.0.

To help evaluate the validity of these requests, it is helpful to consider common “standards of play”. Many municipalities have prepared and adopted ice allocation policies to help guide the allocation of ice time to various groups in an equitable and transparent fashion. Embedded within the more progressive policies are “standards of play” that identify the ideal number of hours to be allocated to each age group and level of play within each sport for games and practices. For example, many municipalities will allocate 1.5 hours per week to a Pee Wee house league team (1 hour for practice and 0.5 hours for a game – the game would be 1 hour but shared with another team). Although the standards of play are guided by advice from various governing bodies, they are typically specific to each community and are established in consultation with local user groups. The Township of Wilmot does not have a formal ice allocation policy or locally adopted standards of play.

An examination of standards of play in several communities suggests that the current allocation to youth clubs in Wilmot (including NHHA, WGHA, and NHSC) of approximately 106 hours per week (as discussed in the following section) is reasonable and not unlike what would be allocated to these groups in other communities. In fact, the average of the benchmarked communities, if their standards of play were used to allocate ice to Wilmot's youth groups, would be 108 hours – 2 hours more than what is currently allocated within the Township. There was some deviation in the allocation to particular groups; for example, by virtue of the NHHA being an “A” Centre for competitive hockey, their needs for some additional ice time appear to be warranted.

This analysis suggests that, for the most part, local youth organizations are getting their “fair share” of access to ice time at the present time. The number of hours requested by local groups is likely overstated – based on comparable standards of play and various local factors we would expect that the shortfall is closer to 6 to 8 hours for the coming season. However, future growth will place additional demands on ice facilities and it is likely that the allocation (which it at its limit) will not be able to accommodate growing demand, thereby creating pressure for a third ice pad in the municipality.

Changes in the regional ice arena supplies also have the ability to impact local ice demand, both positively and negatively, as people have shown a willingness to travel to access quality facilities and affordable / accessible ice times. From our discussions with Township staff and major stakeholders, the only known potential change to the ice surface supply in surrounding communities is the possible loss of the Conestoga College rink following the 2013/14 season; at the present time, the College has indicated that this site may be required for a proposed recreation centre development, although a decision has yet to be made. While the loss of the Conestoga rink would not have a direct impact on ice demand in Wilmot, it is a situation worth monitoring.

4.3 Ice Utilization

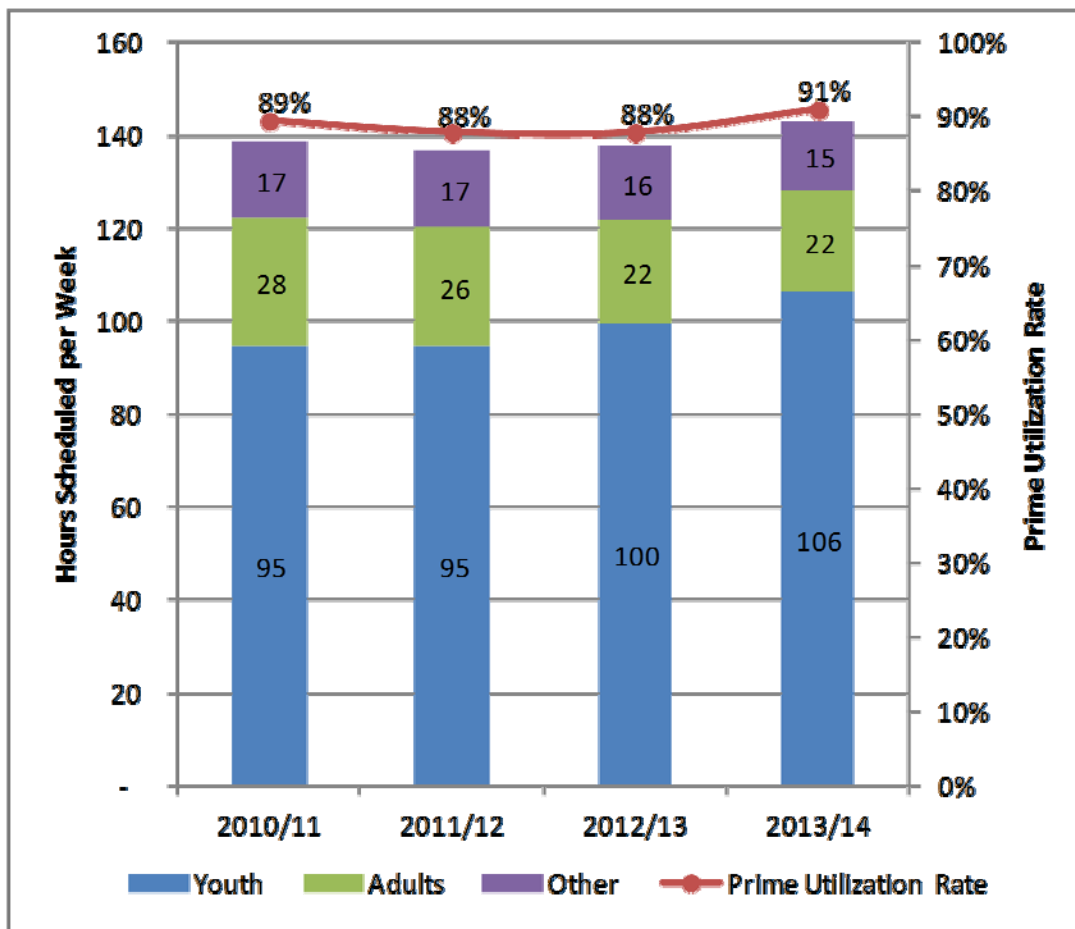
Note: The focus of this analysis is on ice usage during the winter season (generally September to March) as this is the time of year when demand for local youth ice sports is greatest – this is the basis upon which future facility needs should be determined. It is acknowledged that the Township offers spring/summer ice in one ice pad to accommodate a variety of local and regional users and that this is likely to continue.

As is the case in Wilmot and many other communities, minor hockey (including both boys and girls) is the dominant user group of municipal ice rinks – particularly during prime times – with adult activity being relegated to later hours and occasionally Sunday mornings. Upon opening the Wilmot Recreation Complex in 2007 – and moving from one ice pad to two – the Township was able to offer additional ice time to a variety of groups, including out-of-town renters. Although ice allocation in the Township of Wilmot is not governed by a formal allocation policy (as was recommended in the 2007 Recreation Facility Needs Study Addendum), it is addressed through a collaborative annual meeting with primary ice users that provides priority to youth groups and local organizations.

As the following charts illustrate, out-of-town users have largely been eliminated and adult utilization has also been reduced (and generally occurs at less desirable hours) as a result of growing demand amongst youth-serving organizations and the priority given to these groups in allocating ice time. In fact, adult rentals have declined by 21% (6 hours per week) over the past four years, while the allocation to minor sports groups has increased by 12% (11 hours) during this time period.

The anticipated prime time utilization rate (prime time is defined by the Township as 5pm to 11pm Monday to Friday and 6am to 12am on weekends) for the 2013/14 season in Wilmot is estimated at 91%, which is quite high given that it is very difficult to rent the earliest and latest hours, particularly on weekends. In a smaller community like Wilmot, a 100% utilization is not achievable; rather the 91% utilization rate is indicative of an ice arena that is operating at capacity during prime time. An analysis of the Township’s master arena schedules finds that the only blocks of available “prime time” ice are not suitable for youth sports as they are beyond 10pm at night. Not captured by this chart is also the fact that minor hockey is consistently utilizing 1-hour blocks of time on weekday mornings; many other communities are having increased difficulty booking early mornings as these times are not appealing for children and parents.

Weekly Winter Ice Schedules (in hours) at Wilmot Recreation Complex, by Type of Group



Data reflects all hours scheduled in a typical week (including prime and non-prime); some variation may occur from week to week

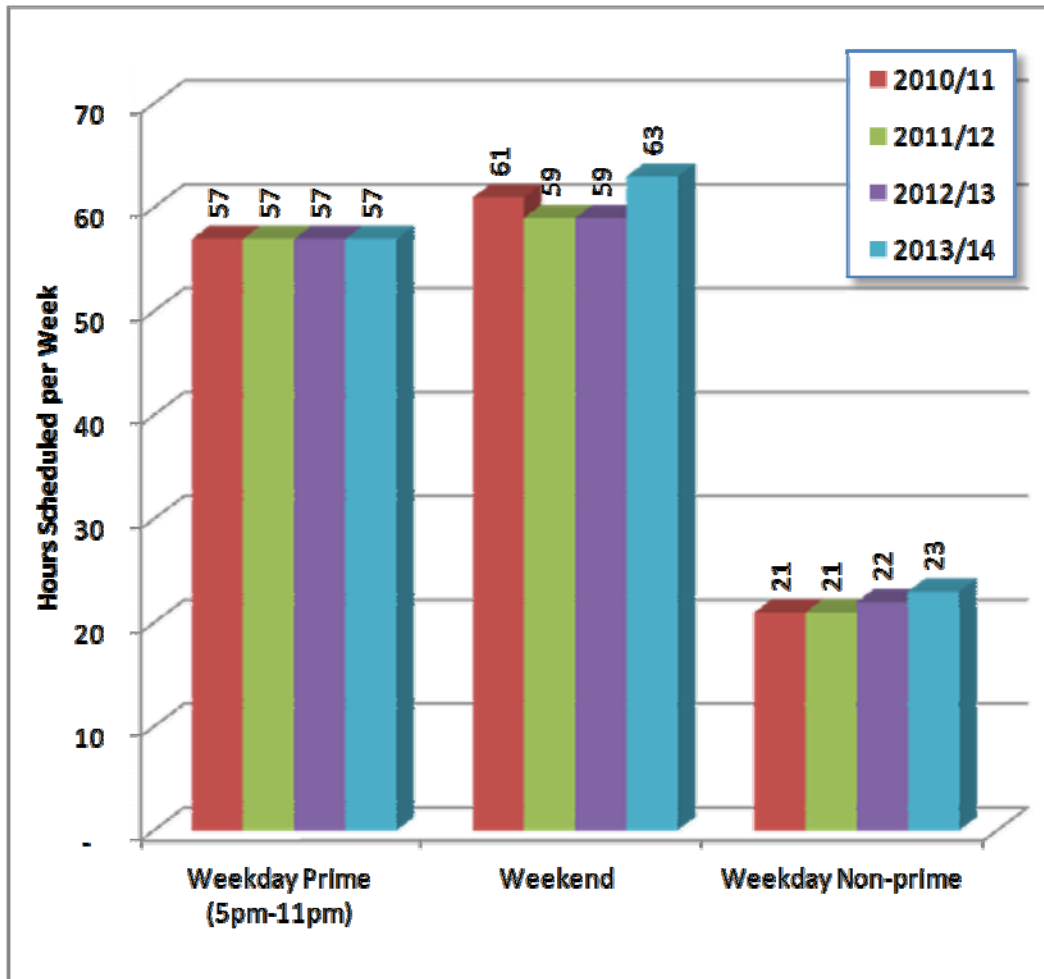
“Other” includes Jr. C, Hockey School, Public Skate, etc.

Source: Township of Wilmot

The following charts illustrate the small increases in weekly rentals at the Wilmot Recreation Complex. Across the two ice pads, there are:

- 60 total weekday prime time hours available – 95% are allocated on the 2013/14 master schedule;
- 72 weekend hours available – 88% are allocated on the 2013/14 master schedule; and
- 105 weekday non-prime hours (excluding ice maintenance) – 22% are allocated on the 2013/14 master schedule.

Weekly Winter Ice Schedules (in hours) at Wilmot Recreation Complex, by Time of Use

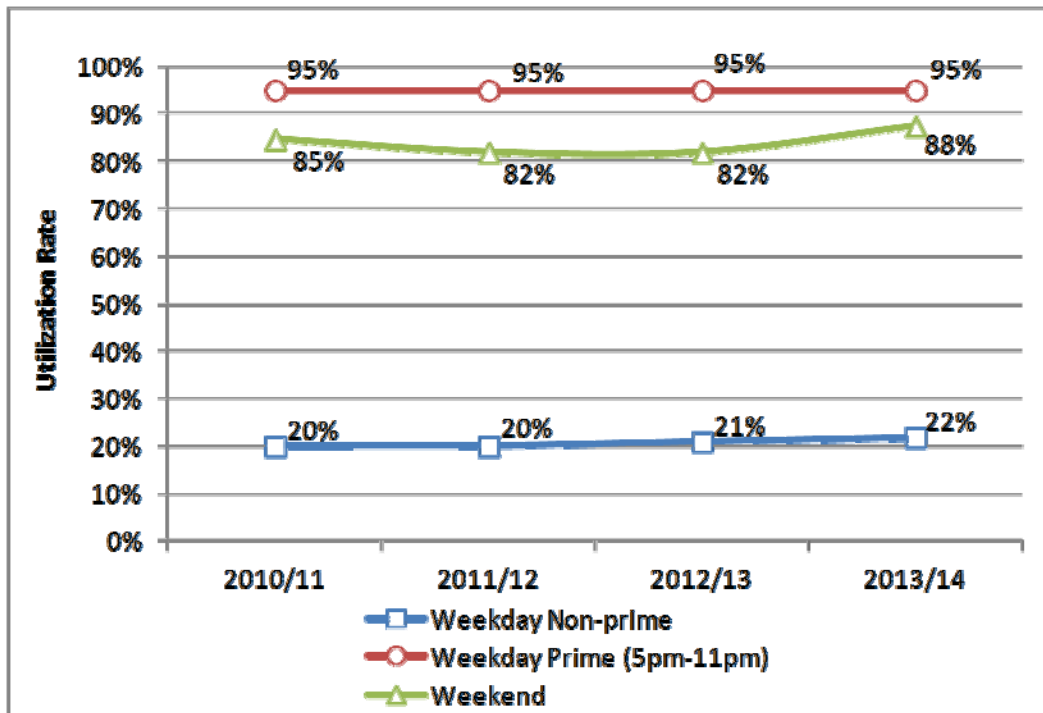


Data reflects all hours scheduled in a typical week (including prime and non-prime); some variation may occur from week to week

Weekday Prime is defined as 5pm to 11pm, Weekend is defined as 6am to 12am, and Weekday Non-prime is defined as 6am to 5pm and 11pm to 12am (minus ice maintenance time)

Source: Township of Wilmot

Utilization Rate per Winter Season, 2010/11 to 2013/14



Data reflects all hours scheduled in a typical week (including prime and non-prime); some variation may occur from week to week

Weekday Prime is defined as 5pm to 11pm, Weekend is defined as 6am to 12am, and Weekday Non-prime is defined as 6am to 5pm and 11pm to 12am (minus ice maintenance time)

Source: Township of Wilmot

As stated earlier, based on typical ice arena profiles, there is little to no opportunity to accommodate additional weekly rentals during prime time and on weekends. Availability exists during non-prime weekday times, however, these are challenging to rent as most residents are in school or at work at these times. With an aging population, hockey leagues for older adults 55+ may provide a modest opportunity for additional daytime usage.

4.4 Participation Rates

In addition to hours rented, another complementary indicator of demand is the number of participants registered in ice sports, particularly minor ice sports as these users are typically accommodated within prime time hours which are in limited supply. Based on data provided by the primary user groups, the total number of youth users in Wilmot has increased by 66 participants (7%) over the past three seasons – it is notable that the population of children and youth (ages 5-19) in the Township increased by about 5% during this span (the Township-wide population grew by 12%), suggesting that participation rates in some activities are still on the rise. In 2012/13, there were 945 youth registered with local ice organizations, representing an increase of 32% (228 participants) since the Wilmot Recreation Complex first opened in 2007/08.

With about 3,925 residents in Wilmot’s 5-19 age cohort (2012 estimate) and 945 registrants, this means that about 24% of children and youth participate in organized ice sports; this is near the upper end of the common range observed in other communities (typically between 20% and 25%). This is indicative of successful community organizations and, as confirmed by the lack of waiting lists, very little pent-up demand.

Registration in Organized Ice Activities – 2010/11 to 2012/13

	2010/11	2011/12	2012/13
Youth Registration			
New Hamburg Hockey Association – NHHA	455	526	510
Wilmot Girls Hockey Association – WGHA (youth only)	165	181	186
New Hamburg Skating Club – NHSC	236	158	226
New Hamburg Junior C Firebirds	23	23	23
Subtotal – Youth	879	888	945
Other/Adult Registration			
Wilmot Girls Hockey Association (adults only)	38	39	33
Adult Leagues / Teams (estimated)	498	432	432
Other; e.g., hockey schools, non-resident youth teams (estimate)	65	65	45
Subtotal – Other/Adults	601	536	510
TOTAL	1,480	1,424	1,455

Source: local user groups, unless otherwise noted

From the preceding participation data, there are some notable trends regarding youth ice sports:

- The number of minor hockey (boys) registrants declined slightly this past season, but has grown by 7% (34 players) over the past five seasons. The data suggests that participation rates have generally levelled out, but that population growth could lead to natural increases over time.
- Girls' hockey has seen the greatest rise in participation – 126% growth (98 players) since their inaugural season five years ago. Unlike the New Hamburg Hockey Association, the Wilmot Girls Hockey Association has grown each of the past five years and this is expected to continue for at least the near future. It is likely that participation rates are still rising for girls' hockey as there are opportunities to add new teams and programs in the coming years, after which participation rates are likely to stabilize.
- Registration in figure skating has fluctuated greatly from year to year due to the variety of program offerings and level of commitment. Registration has increased by 61% over the past five years (86 skaters), much of which can be attributed to the introduction of a power skating program. Trends suggest that participation rates in this sport are generally stable; however, short-term fluctuations can be anticipated. The long-term impact of the club's new competitive skating stream is uncertain.

Given the forecasted increase of the youth population over the next ten to twenty years, it is reasonable to expect that minor ice sports will continue to attract more participants over time.

While children and youth constitute the primary users of ice time in Wilmot, the adult market must not be overlooked. Registration data for adult users is not collected; thus an examination into how many hours are booked for adult play has been undertaken. As shown in the preceding charts, adult groups are expected to rent approximately 22 hours per week in the 2013/14 season – a decrease of 6 hours since the 2010/11 season (due largely to a re-allocation to youth groups rather than declining demand). Many of these groups are quite mobile and are willing to rent time at other arenas in the region, often changing on a yearly basis based on ice availability and rates.

In other municipalities we have analyzed, the allocation of youth versus adult bookings is generally about an 80/20 split, noting that adults typically require less ice time (e.g., no practices) so they can accommodate more users during their allotted hours. Over time as the population ages, it is possible that this ratio will change in favour of adult ice users. In Wilmot, this ratio is currently closer to 85/15 (youth/adult), suggesting that – while the usage profile is not significantly different from most municipal ice rinks – the allocation to the adult hockey community is on the lower end of the typical range.

It is also noteworthy that provincial norms suggest that about 5% of adults ages 20 to 49 are involved in ice sports. Adult participation in Wilmot appears to generally follow these findings (we estimate that about 6.5% of Wilmot adults ages 20 to 49 are active users of the Township's rinks), suggesting that there is nothing unique about adult demand in the Township and that adult participation should fluctuate at a rate similar for population growth in this age cohort, all other factors being equal.

5.0 Ice Surface Needs Assessment

This section evaluates the overall supply of indoor ice pads in the Township of Wilmot. In identifying future ice facility needs, a number of inputs have been utilized, including:

- current and projected utilization (see Section 4.0), with consideration of future population characteristics (see Section 2.0);
- trends in participation (see Section 4.0); and
- “provision targets” that represent a recommended measure of the demand based on a combination of accepted standards of play, market-driven factors, and other local circumstances including trends and stakeholder input (see Section 3.0).

5.1 Estimating Participation

The projected number of ice participants is calculated by applying overall participation rates to the forecasted population of the identified age groups. In doing so, the needs assessment model makes a number of assumptions relating to participation and population growth. First of all, it is assumed that the Township will grow at the rates identified in Section 2.0 of this study. Changes in the Region of Waterloo’s population forecasts (growth allocations are currently under appeal at the OMB) could impact the estimated ice demand for Wilmot; therefore, it is recommended that the population projections and their impact on the needs assessment be closely monitored over the coming years. In addition, except where otherwise noted (i.e., girls’ hockey) this report assumes that participation rates in hockey, figure skating, and their related disciplines will grow in proportion to population growth over the course of the planning period.

With this in mind, the following table illustrates the youth and adult registration levels forecasted for the Township of Wilmot assuming that ice supplies are not unduly constricted.

Projection of Registered Ice Sport Participants, Township of Wilmot (2012/13 to 2031)

	<i>Actual</i>	Forecast			
	2012/13	2016	2021	2026	2031
Youth/Core Registrants (based on a 24% participation rate for residents ages 5 to 19)*	945	1,080	1,180	1,250	1,280
Adult/Other Registrants (based on a 6.5% participation rate for residents ages 20 to 49)	510	520	550	600	660
Total Registrants	1,455	1,600	1,730	1,850	1,940

* To account for the accelerated short-term growth in girls’ hockey, the forecast for 2016 has been increased by 75 registrants, after which it is anticipated to stabilize.

Between the current season and 2031, overall registration in local ice organizations is anticipated to grow from 1,455 to 1,940 – a 33% increase (485 registrants). The number of youth participants is forecasted to grow by 35% (335 registrants) and the number of adult participants is forecasted to grow by 27% (140 registrants). Although the adult population is expected to grow at a faster rate than the youth population, the potential for short-term growth within girls’ hockey is expected to lead to a higher youth participant growth rate, particularly over the short-term.

It is interesting to note that the projection in this report is very similar to the findings of the 2007 Addendum in terms of total participants; however, this report has found justification for a greater registration at the youth level.

5.2 Establishing the Provision Target

A market-specific target is the preferred approach because it is able to consider the impact of participation trends, population growth, and demographic factors. It can also be set at a level that is consistent with local circumstances and public expectations, making it responsive to the specific needs of the Township of Wilmot.

The Township's 2007 Recreation Facility Needs Study Addendum established a provision standard of 1 ice pad per 750 registered youth and adult participants based on the Township's participation rates and demographic profile at that time. The current estimated level of provision is approximately 1 ice pad per 730 participants (based on 1,455 players for two ice pads). Given the growth at the youth levels and the overall pressure being placed on the current ice pad supply, the one pad per 750 players (youth and adult) target should be reassessed to ensure that it is reflective of current and future conditions in Wilmot.

In re-examining this provision target, it is helpful to consider the various factors that are impacting ice utilization in Wilmot. Several of these factors were identified in Sections 3.0 and 4.0, but some key findings are summarized below:

1. Youth registration has been increasing every year since the Wilmot Recreation Complex opened – this increase is most notable in girls' hockey.
2. To remain competitive with other centres, there is a desire amongst boys' and girls' hockey associations to increase practice time and offer additional skill development programs and tournaments. In many communities, shared practices are common at the house league level, sometimes in all divisions and at least up to and including atom; practices are not typically shared at the rep level; practices are less common at the midget and juvenile house league levels.
3. As the boys' and girls' hockey programs grow, they may be re-designated to a higher calibre of centre, resulting in greater ice time requirements.
4. The allocation of prime time hours to youth organizations has increased to a point that there are no meaningful hours left to rent to them – there is little to no opportunity to accommodate additional weekly rentals during prime time and on weekends. As a result, there is concern over inequity regarding weekday/weekend rental ratios. Some communities endeavour to create balance in the weekend/weekday schedules (e.g., London tries not to allocate more than 65% of an organization's time on the weekend). For the 2013/14 season, boys minor hockey is expected to receive 45% of its ice time on weekends, compared to 57% for girls minor hockey.
5. Although the Wilmot Recreation Complex is operating at capacity, there is very little pent-up demand (i.e., no youth are being turned away) – the community is currently coping well with the situation.
6. To accommodate youth, adult rentals have declined by 21% over the past four years; the allocation of ice time to the adult hockey community in Wilmot is lower than many comparable communities, suggesting that adults are not getting sufficient ice time.

7. New Hamburg Hockey Association is renting approximately 6 to 9 hours per week outside of the Township. On one hand, renting outside arenas is an efficient use of an under-utilized resource, perhaps allowing the Township to delay building additional ice surfaces until such time as there is more certainty around local demand. Conversely, outside arenas are not in the Township's control and rentals are at the discretion of the owner; as such, the availability of these ice surfaces to Wilmot groups is uncertain from year to year unless there is a long-term agreement in place. Depending on the location, use of outside rinks may also result in greater travel time and coordination challenges. There is a strong expectation amongst ice organizations that their needs should be accommodated locally.
8. Together, local youth hockey organizations feel that they can use 17.5 to 22.5 additional hours per week of ice time for the upcoming season – our analysis indicates that this is somewhat overstated and that about 6 to 8 hours for youth can be justified. An additional 4 hours for adult groups is also a reasonable target for the short-term, although it is recognized that regional demand could easily eclipse this amount. This total – 10 to 12 hours – represents approximately 0.2 of an ice pad during prime time and weekends (half of which is required to serve youth groups).
9. Boy's hockey, figure skating, and adult hockey are expected to grow generally in line with population growth, however, the participation rate in girls' hockey is still on the rise – there are opportunities to add new girls' teams and programs in the coming years, after which participation rates are likely to stabilize.

Although the 2007 Addendum utilized a provision target that blended youth and adult registrants, these two groups utilize ice very differently. For example, adult demand is more elastic (i.e., an ability to use non-prime hours or to discontinue play for seasons at a time) and there is greater mobility (i.e., they can use arenas outside the municipality), whereas youth are the dominant user of local prime time ice, which is in limited supply. For these reasons – along with the fact that Wilmot is still in growth mode as a municipality – a youth-based target has become the preferred metric for forecasting ice demand in Wilmot. The Township is current providing one rink per 473 youth registrants at the present time (including NHHA, WGHA, NHSC, Jr. C; WGHA women are excluded).

Based on the aforementioned factors, it is recommended that provision target of 1 ice pad per 450 youth registrants (ages 5 to 19) be utilized for assessing Township-wide ice pad needs. This target assumes the following:

- that youth will continue to use the large majority of prime time hours;
- that the Township will attempt to accommodate a modest increase in usage from a broader market of users (e.g., adults, tournaments, etc.);
- that, over the long-term, the intent is to accommodate the needs of all local groups within Wilmot (i.e., not regularly renting time outside of the municipality); and
- that groups will be willing and able to pay for the entirety of their ice needs (note: there is always a concern that lower rates and more desirable times offered at a rink in an adjacent community could attract users away from local ice rinks).

5.3 Applying the Provision Target

The following table illustrates application of the preferred provision target, assuming the existing rate of participation is maintained (i.e., at 24%) and that the youth market segment (age 5 to 19) changes at the forecasted rate; This analysis identifies a deficit of 0.1 ice pads at present, growing to 0.8 ice pads by 2026 and then stabilizing.

Projection of Ice Pad Needs, Township of Wilmot (2012/13 to 2031)

	2012/13	2016	2021	2026	2031
Forecasted Number of Youth Registrants	945	1,080	1,180	1,250	1,280
Number of Ice Pads Required (based on 2 pads at present and a provision target of 1 ice pad per 450 youth registrants)	2.1	2.4	2.6	2.8	2.8
Additional Ice Pads Required	0.1	0.4	0.6	0.8	0.8

Note: the model has been manipulated to account for the accelerated short-term growth in girls' hockey; the model also assumes little change in the amount of ice time allocated to adults and out-of-town markets

5.4 Timing of Future Ice Surface Needs

The 2007 Addendum projected that the ice arenas at the Wilmot Recreation Complex would be at capacity by 2011, which has generally held true. The 2007 report also anticipated that the community would be able to cope with rising demand until a third ice surface was developed in 8 to 10 years' time (approximately 2016 to 2018) or potentially longer if certain targets were not met.

The updated assessment contained in this report finds that there is a small deficit of ice at present (equivalent to 0.1 ice pads), growing to 0.4 ice pads by 2016 and 0.8 ice pads by 2026. Over half of the demand for additional ice – driven primarily by growth at the minor hockey level (particularly girls) – will be realized between now and 2021; the balance is projected to take longer to fully realize and, even then, may not fully account for one entire ice surface until beyond the projection period.

As pressure for additional local ice time mounts, it is likely that some groups will have to run their programs at a less than optimal level (e.g., reduced or shared practice time), and in the case of certain groups, rent ice at arenas outside of the Township. This is already happening to some degree and is a necessary step in the process of establishing the case for an additional ice pad. It can also impact adult activity as less desirable time slots may result in them choosing not to participate or to travel outside the community to do so.

When demand for ice reaches 2.5 ice pads, the Township should seek to provide a third ice pad. Based on current participation rates and population projections, there is justification to provide one additional ice pad by the 2018/19 season.

Much like when the Wilmot Recreation Complex was built and the Township moved from one ice pad to two, it is anticipated that there will be a short period where there is surplus ice time (particularly during non-prime and “shoulder” time). While there is some concern over long-term sustainability of a third ice surface, trends and other factors suggest that there is a likelihood that the ice pad will approach full capacity (in prime time) through additional programming (e.g., skill development, tournaments, etc.) and rentals (e.g., adults, out-of-town users, etc.). The projected demand (80%+ capacity during prime

time by 2026) is strong enough to support this direction, subject to regular reassessments of the factors that may positively or negatively affect ice demand, including participation and Township growth rates. Pricing and availability of ice time (and/or new facilities) in adjacent municipalities could also impact utilization, primarily during the less desirable “shoulder” hours; the Township should continue to monitor the regional ice arena market.

5.5 Summary of Recommendations

The following represent the primary recommendations of this Study:

1. Based on the Township’s current ice allocation profile, a target of one ice pad per 450 registered youth participants is recommended for projecting current and future ice surface needs. Based on this target and a continuation of existing participation rates, there is a small deficit of ice at present (equivalent to 0.1 ice pads), growing to 0.4 ice pads by 2016 and 0.8 ice pads by 2026. Over half of the demand for additional ice will be realized between now and 2021 (driven largely by growth in girls’ hockey); the balance is projected to take longer to fully realize and, even then, may not fully account for one entire ice surface until beyond the projection period.
2. Provide one additional ice pad by the 2018/19 season, when local demand for ice reaches 2.5 ice pads. Based on this timing, it is likely that there will be a short period where there is surplus ice time; however, trends and other factors suggest that there is a likelihood that the ice pad will approach full capacity (in prime time) through additional programming and rentals.
3. The Township should continue to monitor local participation and Township growth rates, as well as the regional ice arena market as these factors could impact local demand and the recommended timing of facility provision. Should the Township decide to allocate ice differently than at present (e.g., accommodate more adult or out-of-town users), this may impact the timing of arena provision.
4. As recommended in the 2007 Addendum, there is merit in establishing an Ice Allocation Policy to apply a consistent approach in determining the allocation of hours to each type of group and activity while providing a guide to priority for usage/allocation of time. This type of policy will be especially useful over the coming years as the demand for ice time exceeds the supply. Based on the variety of groups requesting ice time, establishing such a policy now will better position the Township to address changing demands (including scheduling challenges) as the overall population increases in future years. It also allows a mechanism for the tracking of youth registration and demand and could include an allocation target for adults.
5. It is anticipated that the findings of this Study will be used by the Township to develop a strategy for the provision of future municipal ice surfaces. Specifics relating to the location, design, cost, funding, and form of management for a third ice pad are beyond the scope of this Study. The Township should undertake further study to determine strategies for delivering a third ice surface, including considerations to partnerships, locations, operational models (multi-pad arenas are more sustainable than single pad facilities), and funding (e.g., capital reserve). As noted in the 2007 Addendum, potential strategies may include (but not necessarily limited to):
 - rehabilitation of the New Hamburg Arena;
 - an expansion to the Wilmot Recreation Complex; or
 - new construction at an alternative site (to be determined).