



TOWNSHIP OF WILMOT

PARKS, FACILITIES & RECREATION SERVICES *Staff Report*

REPORT NO: PFRS 2020-13

TO: Council

SUBMITTED BY: Sandy Jackson, Director of Parks, Facilities & Recreation Services

PREPARED BY: Sandy Jackson, Director of Parks, Facilities & Recreation Services

REVIEWED BY: Grant Whittington, CAO

DATE: October 19, 2020

SUBJECT: Indoor Arena Ice Usage and Needs Analysis Update

RECOMMENDATION:

That the recommendations in the Indoor Arena Ice Usage and Needs Analysis Update prepared by Monteith Brown Planning Consultants Ltd. be received and;

That staff proceed with Recommendation #2 '*to undertake further study to determine strategies for delivering a third ice surface*' and;

That funding be included into the 2021 budget as per the existing 10-year Capital Forecast at an estimated cost of \$55,000; and,

That the existing contract with Monteith Brown Planning Consultants Inc. be extended to include strategies for delivering a Third Ice Surface report.

SUMMARY:

The 2020 Capital budget included a project to update the Indoor Arena Ice Usage and Needs Analysis. Monteith Brown Planning Consultants Ltd. were retained to complete the study due to their history with the Township developing the first Ice Needs Analysis in 2013 and the Parks, Facilities and Recreation Services Master Plan in 2017. The rationale for reviewing ice surface

requirements in 2020 is a result of the Master Plan's recommendation to review current statistics related to ice use, conduct public consultation and confirm when a third ice pad project should be considered in the Township.

Due to the conclusions presented in this report, a recommendation to include a new project in the 2021 Capital Budget process to undertake a further study to determine strategies for delivering a third ice surface in the Township is being recommended. This study will include considerations for partnerships, locations, and operational models (multi-pad vs. single pad) and will provide staff and Council with necessary information to help with future ice surface construction decisions.

BACKGROUND:

In 2013, the Township undertook an arena analysis containing a detailed assessment of ice needs. The results were updated and verified when the Parks, Facilities and Recreation Services Master Plan was developed in 2017. The Township uses these documents to develop an implementation strategy for the provision of future municipal facilities such as ice surfaces. Each of the studies includes information related to demographics, population growth, consultation with user groups, and a review of trends of local and industry ice surface demands. The goal of the review is to predict future ice demands and the suggested timing to ensure adequate ice time is available to meet the local demand.

REPORT:

Determining when it is the right time to trigger construction of an additional ice pad is a complex and challenging decision for any municipality. The Township of Wilmot has consistently reviewed demographics, ice use statistics and industry trends since 2007 to ensure this decision is well thought out before considering this type of major capital investment.

In 2020, Monteith Brown Planning Consultants Ltd. (Monteith Brown) were retained by the Township to prepare the report attached as Appendix "A" *Indoor Arena Ice Usage & Needs Analysis Update*. This report builds on information previously prepared by Monteith Brown as the consultants who developed the Parks, Facilities and Recreation Services Master Plan in 2017, and the original Arena Ice Usage study in 2013.

In the 2020 report, Monteith Brown provides the following information:

- A summary of current ice facilities and level of prime-time ice bookings;
- A review of area municipal arenas within a 30 km/ 30-minute drive from Wilmot Township;
- A review of previous studies undertaken by the Township;
- Inclusion of related recommendations from the 2017 Parks, Facilities and Recreation Services Master Plan related to ice needs in the community;
- A review of stakeholder consultation undertaken as part of the 2020 ice needs analysis;
- A community profile outlining existing and forecasted population growth;

- A demographic review related to age structure within the community;
- An overview of socio-economic trends related to participation in sports;
- A review of pressures impacting key arena stakeholders regarding access to ice;
- A summary of a survey issued to all ice users currently utilizing the Wilmot Recreation Complex (WRC);
- A chart outlining the current registration levels for the major ice users;
- A comparison to national and provincial trends related to ice use;
- Reference to the current and potential future impacts of COVID-19; and
- An outline of the timing for future ice surface investment.

This comprehensive report provides a detailed overview of the topics that need to be considered before investing in an additional ice surface. Some of these details have been summarized in the sections below.

Local & Regional Arena Supply:

When the WRC was constructed and the arena complex opened in 2007, the New Hamburg Arena & Community Centre (251 Jacob Street) ice surface was decommissioned. This new complex in the Township resulted in one additional ice surface. This additional ice was quickly filled during prime-time hours by local ice user groups such as New Hamburg Hockey Association (NHHA), Wilmot Girl's Hockey Association (WGHA), the New Hamburg Skating Club (NHSC) and the OHA Jr. C New Hamburg Firebirds (NHF). Remaining prime time ice was booked by adult hockey groups, public skating and during the day, school board use.

As a result of the local demand, travelling outside the Township to rent ice has been a historic practice for some Wilmot-based groups. In addition, some groups, particularly adults, are unable to rent ice locally due to the high demand for youth ice programs. This is a missed revenue opportunity for the Township as adult ice rental rates are 35% higher than youth rates.

Previous Studies

In 2017 the Parks, Facilities and Recreation Services Master Plan was undertaken with extensive public engagement and was approved by Council. This Master Plan found support for the need for a third ice pad due to the local demand and the anticipated population growth in the Township. Three recommendations within the Master Plan were identified related to ice use:

- 1) Re-evaluate the need for a third ice pad in 2020, and if a third pad is determined to be required, undertake a site selection process. This study is attached as Appendix "A" and summarized below.
- 2) Undertake an engineering study to assess the costs associated with re-opening the arena at the NHCC. This study was completed in 2019 and included a visual structural review and recommendations for repairs and improvements. Some of the recommended repairs

are being undertaken in 2020 and further repairs will be included in the 10-year capital plan. This study did not include estimated replacement costs for the arena floor, refrigeration lines or the ice mechanical plant. Further study will be required to determine the suitability and costs associated with considering this facility for a future ice surface.

In addition to the engineering study, a Building Condition Assessment (BCA) report was completed in June 2020 as part of the Township's BCA program. This study reviewed Architectural, structural, mechanical and electrical services. These studies will assist future site selection recommendations.

- 3) Develop an Ice Allocation Policy to ensure that the allocation of ice time is distributed efficiently and equitably. This recommendation was undertaken in 2020 by staff and will be used as an internal guideline for scheduling ice.

The Ice Usage & Needs Analysis, attached as Appendix "A", was completed in the summer of 2020 and provided three recommendations based on the analysis provided in the report:

1. Continue to target 1 ice pad per 450 registered youth participants (ages 5 to 19) in the planning for current and future ice surface needs, consistent with the Parks, Facilities & Recreation Services Master Plan and the previous Ice Needs Analysis. Based on this target and a continuation of existing participation rates, there is a deficit of ice at present (equivalent to 0.5 ice pads), growing to 1.1 ice pads by 2026 and 1.4 ice pads by 2031.
2. Provide one additional ice pad as early as the 2021/22 season. It is anticipated that the findings of this Analysis 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 Analysis.

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). Potential strategies may include (but not necessarily limited to):

- rehabilitation of the New Hamburg Community Centre as a winter ice venue;
 - an expansion to the Wilmot Recreation Complex; or
 - new construction at an alternative site, with capacity for a fourth municipal ice pad (to be determined through future arena assessments).
3. Review potential implications of COVID-19 on arena participation and utilization rates as they pertain to short-term arena demand. The need for a fourth ice pad should be confirmed based on arena market factors including (but not limited to) the rate and

timing of population growth (with emphasis on growth in the 5 to 19 age group), changes to participation rates, additions or removals of ice pads from the regional arena supply, changes to user group programming requirements and capabilities, etc.

Stakeholder Consultation & Local Utilization Rates

Monteith Brown undertook an extensive stakeholder consultation when completing the 2020 Indoor Ice Usage Needs Analysis. Interviews with the primary user groups included NHHA, NHSK, WGHA and NHF organizations. In addition, a feedback form was sent to other arena user groups with 19 groups submitting information to support the findings. Stakeholders provided information regarding current and forecasted participation, ice needs, hours booked outside the Township and other valuable information to support the recommendations. A summary of the information received from the key stakeholders is outlined below:

NHHA

- Registration ranged from 560 – 600 participants over past three seasons, representing 20% growth compared to when the 2013 Ice Needs Analysis was prepared
- Experiencing growth in 4-6-year-old age group and midget and juvenile divisions
- Identified need for 20 – 30 additional hours of ice per week based on out of town bookings and the need for additional practice ice for rep teams to stay competitive
- Strongly support a third ice pad in Wilmot with a preference for a centralized location at the WRC

NHSC

- Registrations range from 240 – 255 participants over the past three seasons
- Registrations have increased 15% over the past three seasons, particularly due to CanSkate and powerskating programs
- Competitive figure skating program has been shrinking which aligns with provincial and national trends
- The club does not use out of town facilities and does not currently require additional ice.

WGHA

- Registration growth of approximately 5% over the past three years driven by continued interest in girls' hockey (particularly the Novice division) resulting in 235–275 registered players over the past three seasons
- WGHA is consistently renting approximately 8 hours of ice out of town
- Including out of town use, the club indicated they could use an additional 16-25 hours of ice if a third pad were available.

NHF

- The Jr. C team has 23 players on their roster annually

- This group is currently satisfied with their ice allocation at the WRC, however, noted potential interest in securing additional practice ice in the future.

These key user groups identified the need for 37-56 additional hours of ice use if a third pad was available in the Township. This represents 30–47% in ice time from the four primary groups without considering interest from any other groups.

Other Arena User Groups

- 80-85% of ice use is currently allocated to youth programming. This aligns with the Ice Allocation Guideline
- With only 15-20% of ice available for adult groups, many of these groups are unable to find ice time locally
- These groups pay approximately 35% more per hour of ice than youth groups and can play a significant role in revenue generation, thereby offsetting operating costs.

The 2020 Ice Usage & Needs Analysis indicated that based on the Township's statistics for ice use, prime time rentals have remained strong at 92% over the past three years and the WRC Arena is operating near capacity. This is consistent with findings from the 2017 Master Plan and the 2013 Ice Study. The remaining 8% of prime-time ice is generally undesirable as it includes half hour time slots and hours later in the evening. Prime-time hours are defined as Monday through Friday 5pm – 11pm and Saturday and Sunday 6am to 12am.

Community Profile

The Analysis undertook a detailed review of the Township's existing and forecasted population growth, which is projected to grow from the current level of 21,850 and is projected to reach 28,500 by 2031. Community age structure was also analysed and identified a 43% increase in forecasted youth residents (age 5-19) between 2016 and 2031 based upon projections prepared by the Region of Waterloo. This aligns with an increased demand in ice needs. Other socio-economic trends were also identified including the impact of participation in higher cost ice sports based on a higher average income; lower proportion of residents living below the poverty line; and lower than provincial level of residents born outside of Canada who may not have exposure or interest in ice sports.

Ice Surface Needs Assessment

The chart below is included as Table 3 in the Ice User Study attached as Appendix "A". This chart shows the actual 2020 participation rates and the forecasted rates determined through the statistics and comments provided by the user groups. This chart is the basis for the recommendation that a third ice pad is needed in the Township.

Projection of Registered Ice Sport Participants, Township of Wilmot (2012/13 – 2031) (see pg18 of Appendix “A”)

	Actual	Forecast	
	2019/20	2026	2031
Youth/Core Registrants (based on a 27% participation rate for residents ages 5 to 19)	1,143	1,400	1,550
Adult/Other Registrants (based on a 5.5% participation rate for residents ages 20 to 49)	424	490	535
Total Registrants	1,567	1,890	2,085

The chart below identifies the timing for projection of new ice pads based on the research completed by Monteith Brown. When applying the recommended ratio of one ice pad per 450 registered youth, the projection of ice pad needs indicates the need to consider site selection and construction of an additional ice pad as early as 2021. The projection assumes that the Township will experience population growth at the rate projected by the Region (including for the 5 to 19-year age group) and that local ice sport participation rates are sustained.

Projection of Ice Pad Needs, Township of Wilmot (2019/20 – 2031) (see pg19 of Appendix “A”)

	2019/20	2026	2031
Forecasted Number of Youth Registrants	1,143	1,400	1,550
Number of Ice Pads Required (based on 2 pads at present and a provision target of 1 ice pad per 450 youth registrants)	2.5	3.1	3.4
Additional Ice Pads Required	0.5	1.1	1.4

The 2020 Ice Usage & Needs Analysis indicates that Wilmot’s arena market is growing at a faster rate than previously identified in earlier studies. This has accelerated the need to consider a third ice pad. The ice pad demand threshold has reached 2.5 ice pads which aligns with the proposed timing in the 2013 ice study as the recommended timeline to look at an additional ice surface to meet demands.

The first step in addressing the ice needs is to complete a site selection and service delivery study. This will help formulate budget needs and timelines should the decision to move forward with a third ice surface be included in the 10-year capital program.

COVID-19 Impacts

The Analysis was undertaken in summer of 2020 was prepared during the “first wave” of the COVID-19 pandemic. The Analysis acknowledges the potential impact the pandemic could have on long-term demand for arena services and facilities. A short-term slowdown in growth of ice use was anticipated as a result of COVID-19, however, the fall registrations for both NHHA and WGHA have shown only a slight decrease in numbers to date. That said, the

second and potential future waves of the pandemic could impact this participation level and it is anticipated that the 2021/22 season could also be impacted. This will be a consideration when timing for construction is proposed and once the site selection study is completed should this report be approved.

ALIGNMENT WITH THE TOWNSHIP OF WILMOT STRATEGIC PLAN:

The Indoor Arena Ice Usage and Needs Analysis Update report is aligned with following Township Strategic Plan goals:

- *We enjoy our Quality of Life*, through the action of *Providing Recreational Opportunities for Everyone*;
- *We Have a Prosperous Economy*, through the action of *Maintaining our Infrastructure*
- *We Are an Engaged Community*, through the action of *Involving Volunteers and Integrating Community Groups*.

FINANCIAL CONSIDERATIONS:

The purpose of this report is to outline the findings of the 2020 Indoor Arena Ice Usage & Needs Analysis Update Study and proceed with the inclusion of \$55,000 in the 2021 Capital Budget to undertake further study to determine strategies for delivering a third ice surface.

This proposed study will help determine site/building feasibility and estimated capital costs of construction. Professional services for architectural and/or engineering analysis may be included to develop facility fit diagrams; order of magnitude costs or Class D construction budgets; and service delivery modeling to determine staffing costs; and any other detailed information that will assist the Township with location and construction decisions.

Each of the three site location options outlined above (rehabilitated NHCC arena, add on to WRC or look for a new site) and any additional options would be considered in this study. Results of the study would be presented to Council in 2021 prior to future budget deliberations.

Monteith Brown Planning Consultants Inc. have completed all previous studies related to this next step. Due to their significant background knowledge, staff are recommending that the Terms of Reference be prepared to extend the existing contract, and that the follow up report to determine strategies to deliver a third ice pad be awarded to Monteith Brown. The extension of the existing contract with Monteith Brown is in the best interests of the Township for consistency purposes and is permitted within the Township's procurement by-law with the approval of Council.

ATTACHMENTS:

Appendix A: Indoor Ice Usage & Needs Analysis Update prepared by Monteith Brown Planning Consultants Ltd.



Township of Wilmot
**Indoor Arena Ice Usage &
 Needs Analysis Update**
 September 2020





Township of Wilmot

Indoor Arena Ice Usage and Needs Analysis Update

FINAL REPORT

September 18, 2020

Prepared by:


Monteith♦Brown
planning consultants

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1.0 Introduction

1.1 Overview

The Township of Wilmot regularly assesses the usage of its arena system to plan for future needs. This Indoor Arena Ice Usage & Needs Analysis (“the Analysis”) updates assessments most recently carried out as part of the Township’s 2017 Parks, Facilities & Recreation Services Master Plan.

The purpose of this Analysis is to reassess the timing of future ice surface provision within the Township by updating the ice surface component of the 2017 Master Plan (which included a high level assessment of all municipal recreation services and facilities) and a 2013 arena analysis under the same name (which contained a detailed assessment of ice needs). 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 (including updated age-based data and population forecasts);
- Evaluate changes in utilization of Township of Wilmot ice surfaces since the Master Plan;
- Gather input from major local ice sport organizations regarding current and future demand; and
- Project future ice surface demand based on the items above, including timing of anticipated need for a third municipal ice surface.

The Township will use this Analysis to develop an implementation strategy for the provision of future municipal ice surfaces. Specifics relating to the location, design, cost, and form of management for additional ice pads are beyond the scope of this Analysis.

1.2 Note about COVID-19

This Study is being prepared in 2020 during the midst of the COVID-19 pandemic. The pandemic has the potential to affect the long-term demand for and delivery of arena services and facilities, however, the ultimate scope and scale of change is presently unknown. A short-term slowdown in the growth trajectory of local ice sports is possible; longer-term impacts will need to be monitored. Early observations are that while the Township has re-opened one ice rink, groups are seeking allocations similar to pre-pandemic levels. This is resulting from user groups having to accommodate a reduced participant load per hour due to physical distancing requirements along with access to a fewer number of timeslots resulting from the Township having to spend more time cleaning in between rentals and the second rink remaining closed. While impacts on overall registration are unknown, it is a positive sign that user groups are able to book available arena times.

The Township and many of the other parties involved in recreation services will be working hard to address the challenges presented by COVID-19. It is believed that long-term planning and strategic investment are vital to support the significant role that the recreation sector plays in personal, social, and economic recovery and revitalization for the Township of Wilmot.

1.3 Local & Regional Arena Supply

The Township operates two NHL-regulation sized ice pads at the Wilmot Recreation Complex (WRC) with six change rooms per pad and spectator seating for 350 and 750 spectators for each respective ice pad. The arena is part of a broader multi-use community centre that includes an indoor aquatics facility, fitness space, youth centre, program rooms, and a number of outdoor recreational amenities. The WRC is centrally located between the Township's two primary settlement areas of New Hamburg and Baden with direct access to Highway 7, drawing residents from across Wilmot as well as area municipalities.

The New Hamburg Community Centre (NHCC) is a former arena whose ice plant was mothballed after the opening of the WRC in 2007, a decision supported by the findings of the Township's 2002 Recreation Facility Needs Study. Originally constructed in 1948, the NHCC was most recently renovated in 2013 to improve the entrance, lobby and washrooms. The arena's dry floor is currently being used by the Wilmot Family Resource Centre for youth programs, the Community Players Theatre, special events, and a limited number of community rentals; it is not currently capable of being used for ice sports or activities.

In addition to the WRC, there are a number of arenas in area municipalities. Ice sport participation is typically regional in rural communities, driven in part by the wide geographic reach of certain hockey leagues and skating programs as well as the ability to access ice at more convenient times than would be possible in larger urban communities. Notable arenas located within 30 kilometres, or approximately a 25 to 30 minute drive, of the WRC include:

- City of Kitchener – Lions Arena and Queensmount Arena (two single pad arenas), while the City's Leisure Facilities Master Plan recommends a feasibility study be completed for a twin pad arena in southwest Kitchener;
- Township of North Dumfries – North Dumfries Community Complex and Queen Elizabeth Arena (single pad arenas), noting that the Township is presently engaged in a study to determine its long-range arena needs that could involve removal or replacement of the Queen Elizabeth Arena;
- Township of East Zorra-Tavistock – Tavistock & District Recreation Centre (single pad arena);
- Township of Blandford-Blenheim – Plattsville Community Arena (single pad arena);
- Township of Wellesley – Wellesley Arena (single pad arena) which is planned to be replaced with a new arena facility; and
- City of Stratford – William Allman Memorial Arena and Dufferin Arena (two single pad arenas), along with the Rotary Complex (twin pad arena).

Traveling outside the community to access available ice time or more favourable rental rates has been a historic practice for certain Wilmot-based groups, although it may not be a sustainable solution for all residents due to challenges with travel time and access. The Township's primary mandate is to address needs directly attributable to Wilmot residents; given the regional supply of arenas, it would not be sustainable to provide arenas in Wilmot to directly respond to non-resident organizations due to tax funding inequalities that would otherwise exist, though some economic spinoff may be attributable to casual players coming from outside of the Township.

1.4 Previous Studies

In January 2017, Township of Wilmot Council endorsed the Parks, Facilities & Recreation Services Master Plan prepared by Monteith Brown Planning Consultants. With the assistance of an extensive public consultation program and supported by a comprehensive assessment of indoor recreation facility needs, the Master Plan found that the Wilmot Recreation Complex arena was operating at capacity during many prime time periods and that selected arena users were travelling outside of the Township to access ice time available in other municipalities. **The Master Plan found support for providing a total of three ice pads in Wilmot**, confirming previous analyses prepared as part of the 2013 Indoor Ice Usage and Needs Analysis, along with the 2007 Addendum to the 2002 Recreation Facility Needs Study. Each of these studies identified options for a third ice pad, but did not evaluate or select a preferred provision option.

More specifically, the 2017 Master Plan advanced the following recommendations for Wilmot's arena system and their implementation has provided rationale for updating the Master Plan's arena assessments through this Analysis.

PFRS Master Plan Recommendation	Status / Implementation
<p><i>#12. Re-evaluate the need for a third ice pad in 2020 following the expansion of the New Hamburg treatment plant. The Township should monitor participation and utilization trends during this time to ensure that the demand for ice is sustained during this period. This exercise should also confirm the size of the children/youth population once the 2016 Census for population by age cohort has been released, seek to determine if national hockey participation trends (declining participation) are affecting Wilmot, undertake consultation with arena groups, and investigate opportunities in adjacent communities to accommodate additional capacity within their respective arenas to accommodate Wilmot residents.</i></p> <p><i>If a third ice pad is determined to be required, undertake a site selection process, which should include the following options: a) re-opening the New Hamburg Community Centre for ice, b) expansion of the Wilmot Recreation Complex, and c) any other site(s) deemed appropriate for consideration.</i></p>	<ul style="list-style-type: none">– <i>Recent engineering improvements to Wilmot's water treatment plant have expanded its sewage capacity to service a population of 28,500 persons, thereby addressing criteria contained in Recommendation #12.</i>– <i>2016 Census results have been considered in this Analysis and confirm approximately 4,000 youth between the ages of 5 and 19.</i>

PFRS Master Plan Recommendation	Status / Implementation
#13. Undertake an engineering study to assess the costs associated with re-opening the arena at the New Hamburg Community Centre to assist with identifying the location for a third ice pad should demand exist in the future. This study should also identify the costs associated with converting the floor pad into a warm building, in the event that another option for a third ice pad is selected.	– An engineering report was prepared in 2019 for the New Hamburg Community Centre, thereby addressing Recommendation #13. That report recommended several options for renovations including the ability to accommodate seasonal ice usage as well as a multi-purpose warm floor.
#14. Develop an ice allocation policy to ensure that the allocation of ice time is distributed efficiently and equitably.	– Township staff are finalizing an Ice Allocation Policy, thereby addressing Recommendation #14.

At the time that this project was initiated, the Township had already submitted an application for the Investing in Canada Infrastructure Program (ICIP) for the New Hamburg Community Centre. The Township had requested funding for modernization activities such as slab and rink board replacement, building and fire code compliance, accessibility for persons with disabilities, and replacement of selected mechanical components. Township staff have been since advised that the application was unsuccessful.

1.5 Stakeholder Consultation

To assist in determining the appropriate provision of ice surfaces, interviews were conducted with the Township of Wilmot's primary users of ice time while questionnaires were sent out to other groups that make use of local ice pads and dry floors. 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.

One-on-one interviews were held over telephone and video conference platforms in June 2020 with representatives of:

- | | |
|-------------------------------------|-----------------------------------|
| 1. New Hamburg Hockey Association | 3. New Hamburg Skating Club |
| 2. Wilmot Girl's Hockey Association | 4. New Hamburg Junior C Firebirds |

A feedback form was also created on the Township of Wilmot website and all arena user groups were invited to share their thoughts in June/July 2020. In addition to the primary groups listed above, the following organizations and individuals submitted a response for consideration in the planning process.

- | | |
|--|--|
| 1. Amyotte Men's Hockey (<i>summer ice user</i>) | 11. New Hamburg Skating Club |
| 2. Bingeman Winter & Summer Hockey | 12. Next Level Up Hockey |
| 3. Community Players of New Hamburg | 13. Red Lions Pick-up Hockey |
| 4. D'Aguilar Pick-up Hockey | 14. Stonecroft Ball Hockey |
| 5. Denomme Sunday Morning Pickup Hockey | 15. Tobola Pick-up Hockey |
| 6. Dordan Mechanical Hockey | 16. Tuesday Night Ball Hockey |
| 7. Men's Shiny Hockey (<i>summer ice user</i>) | 17. Wanner Pick-up Hockey (<i>summer ice user</i>) |
| 8. Murray Friday 3 on 3 Half Ice Hockey | 18. Wilmot Girls Hockey Association |
| 9. New Hamburg Firebirds | 19. Wright Sunday Morning Hockey |
| 10. New Hamburg Hockey Association | |

2.0 Community Profile

The Township's demographics are part of the market-based considerations that will be assessed specifically in relation to arena needs and ice sports. The following is a summary of pertinent demographic and socio-economic trends, building upon trends that can be referenced in the 2017 Parks, Facilities, and Recreation Services Master Plan.

2.1 Existing and Forecasted Population Growth

Based upon the following, a percentage of the 6,650 new residents forecasted to arrive in Wilmot by 2031 can be expected to participate in ice sports and thereby generate needs for indoor arenas.

- The Region of Waterloo estimates that Wilmot's year end 2019 population is 21,850 persons.¹ This figure will be used as the baseline figure for this Analysis.
- The Township's annualized average population growth rate was nearly 1.5% between the 2011 and 2016 Census periods. This was half of the annual average rate between the 2001 and 2011 Census periods indicating that growth in the Township has slowed in recent years. By comparison, Waterloo Region grew by an average of 1% per year between 2011 and 2016.
- New Hamburg (9,100 persons) and Baden (5,100 persons) are the largest settlement areas by population in the Township.²
- Wilmot's population target for the year 2031 is 28,500 persons as allocated by the Region of Waterloo in conformity with the Provincial Growth Plan for the Greater Golden Horseshoe. This represents growth of 6,650 persons over the next 11 years, or annualized average growth of 2.8% which is nearly double the rate of growth experienced between the 2011 and 2016 Census periods.
- The impact of the COVID-19 pandemic is an evolving matter. At the present time, the pandemic has resulted in an economic slowdown in growth across Canada due to limited travel, reduced construction activity, employment disruptions and curtailed migration. Over the longer-term, research suggests that the Greater Golden Horseshoe (of which Wilmot is a part) will remain attractive to growth and that previous population and employment forecasts will continue to be achieved.³ This may mean a brief "pause" in Wilmot's positive growth, the timing and severity of which will require ongoing monitoring.

¹ Region of Waterloo. April 14, 2020. Year-End 2019 Population and Household Estimates for Waterloo Region. Report PDL-CPL-20-11 prepared by the Planning, Development and Legislative Services Department. Table 1.

² Township of Wilmot Development Services Department. 2019. Approximate Township Population Information as of December 31, 2019.

³ Ministry of Municipal Affairs and Housing, Greater Golden Horseshoe: Growth Forecasts to 2051. Technical Report. Hemson Consulting Ltd. June 16, 2020.

2.2 Age Structure

Based upon the following, Wilmot's arena system can be expected to continue experiencing growth-related pressures from younger age groups despite an overall aging of the population.

- Wilmot's Census median age was recorded at 41.4 years in 2016, an increase of 3 years compared to 2001. The Township's 2016 median age was 3 years older than that of the Region of Waterloo but similar to the provincial median age.
- Children and teens in the 5 to 19 age group typically account for the majority of prime time usage in many arena systems, particularly on weekdays during the early to mid-evening. The 2016 Census recorded 4,005 persons between the ages of 5 and 19, representing 19% of all residents which is a similar proportion to that of Waterloo Region (18%). By the year 2031, the number of children and teens in this age group is forecasted to reach 5,700 persons⁴ thereby adding an additional 1,700 persons and representing an increase of 43% over the 2016 Census figure.
- Adults between the ages of 20 and 49 typically account for the remainder of ice sport users, often booking times in "shoulder periods" that occur in the later evening. The 2016 Census recorded figure of 7,375 individuals in this age group is projected to grow to approximately 9,700 persons⁵ by the year 2031, an increase of 32%.
- A percentage of older adults ages 50+ also play ice sports, albeit at a lower participation rate relative to other age groups and commonly during off-peak/non-prime weekday daytime hours. The 2016 Census recorded figure of 7,860 individuals in this age group is projected to grow to approximately 11,400 persons⁶ by the year 2031, an increase of 45%.

43%

Percentage increase that is forecasted in the number of Wilmot residents ages 5 to 19 between 2016 and 2031.

⁴ Correspondence provided by the Region of Waterloo in June 2020. Uses the moderate growth forecast applied to the Township's estimated 2031 population by single year of age, consistent with the Region of Waterloo Official Plan.

⁵ Ibid. Correspondence from the Region of Waterloo, June 2020.

⁶ Ibid. Correspondence from the Region of Waterloo, June 2020.

2.3 Other Socio-Economic Trends

Based upon the following, immigration and income are not expected to negatively impact ice sport participation in Wilmot to the extent that they have in other parts of Ontario.

- Participation in ice sports can be influenced by the degree of immigration in a community, particularly since a great deal of in-migration across Canada and Waterloo Region has come from countries that do not typically play ice sports. This may be less of a factor locally since the number of Wilmot residents born outside of Canada has remained relatively unchanged (the Township added just 500 immigrants between the 2001 and 2016 Census periods) while the proportion of immigrants as a share of Wilmot's population is 10%, less than half of the Region's proportional share of immigrants (23%).
- Visible minority rates have increased from 2.2% of the total population in 2001 to 3.4% in 2016. However, the percentage of visible minorities living in Wilmot remains well below that of Waterloo Region (19%).
- Participation in ice sports is influenced to a certain degree by household income, largely associated with costs of equipment, ice time and travel. The Township's Census median household income of \$96,154 in 2015 is 24% higher than the Waterloo Region median and 29% above the provincial median, suggesting above average interest and ability to participate in ice sports.
- The percentage of Wilmot residents living below the Low Income Cut-Off, after-tax (LICO-AT) has decreased between 2005 and 2015. The 2016 Census recorded 2.2% of Wilmot residents living below the LICO-AT (455 persons) compared to 2.8% recorded through the 2006 Census. Proportionally speaking, substantially fewer Wilmot residents lived below the LICO-AT in 2015 compared to Waterloo Region and the province (9.8% respectively for each).
- The COVID-19 pandemic has had a major immediate impact on sports, with the season for most team sports cancelled or delayed. Wilmot's ice users are concerned about the implications on the upcoming 2020/21 season, particularly the safety of their players and restrictions that may be in place. The situation is fluid and the Township and sport associations will follow the best practices and protocols put forward by public health and regulatory bodies. It is not currently known how this will affect interest in ice sports or future registration levels. It is possible that household discretionary spending may decline in the short-term due to higher rates of unemployment, which could lead to lower participation in more costly and time-intensive activities such as ice sports. Longer-term prospects will need to be monitored.

3.0 Local Pressures & Utilization Rates

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

3.1 Pressures Impacting Arena Stakeholders

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.

Interviews with Primary Arena Users

The following summarizes the major points of discussion as well as written feedback that each of these organizations also contributed through the stakeholder survey.

New Hamburg Hockey Association (NHHA)

- NHHA registrations have historically hovered around 560 players but have been in the range of 600 players over the past two seasons. They are seeing growth primarily in 4 to 6 year olds with many new families coming to Wilmot but are also retaining older players in the midget and juvenile divisions. While COVID-19 may affect short-term registration rates, particularly among families that have lost income, NHHA would expect registrations to rebound at some point in the future.
- NHHA presently uses approximately 70 hours per week at the WRC plus goes out of town to rent 7 hours per week at arenas in Wellesley and Plattsville; in addition, rep-teams are securing additional time in other municipalities out of their own team budgets. The need to book time in area municipalities is driven by an inability to secure prime times at the WRC based on current scheduling and allocation, something that is challenging for NHHA's rep-level teams (and parents are not always willing to travel out of town for practices).
- Based on the amount of time being booked outside of Wilmot and a stated target to add between 0.5 and 1 hour of practice time for each rep team (to stay competitive with regional teams), NHHA believes that they could easily make use of another 20 to 30 hours per week in Wilmot beyond their current allocation.
- NHHA strongly believes that a third ice pad is required in Wilmot and thinks that parents would prefer a centralized location such as the WRC. While the New Hamburg Community Centre is a viable option and there is community support from a sentimental perspective, there are challenges such as parking and equipment storage (the latter of which is exacerbated by half-ice play now mandated by Hockey Canada as part of its LTAD model, requiring the use and storage of temporary boards).

New Hamburg Skating Club (NHSC)

- NHSC registrations have increased 15% over the past three seasons, driven largely by the club's CanSkate and powerskating programs. Higher registrations can be attributed to population growth in Baden along with the fact that the WRC can conveniently be reached from the west end of Kitchener (the NHSC reports that it services a number of residents from Kitchener's Forest Heights community who may otherwise spend more time travelling to arenas in the City). NHSC also is observing growth among 10 to 16 year olds in learn-to-skate programs, particularly among newcomers to Canada.
- The NHSC competitive figure skating program has been shrinking in recent years, mirroring national and provincial trends caused by financial barriers, the hard work and time commitment required, and possibly a shift in interests to team-based activities (figure skating is largely an individual sport).
- While there are other skating clubs that operate in area municipalities, the NHSC can train skaters at a higher level due to their ice time capabilities (as other clubs may have less time available to them in their own arena systems). The club also reports a positive relationship with Township staff who work to address needs and concerns that may arise.
- The club does not use arenas in other municipalities and their current allocation would allow program growth for the foreseeable future. Therefore, the NHSC does not require additional arenas or ice time in Wilmot or elsewhere.
- The COVID-19 pandemic has the potential to affect certain programs but note that they have done some preliminary inquiries with their members and feedback is that most skaters plan on returning once the arenas open and/or physical distancing restrictions are lifted. There is a worry that some figure skaters may not return if there is an extended lay-off as figure skaters are used to structure and routine, and they may find other interests in their free time.

Wilmot Girls Hockey Association (WGHA)

- With 273 players in the 2019/20 season, WGHA has experienced 5% growth over the past three years driven by continued interest in girls' hockey and rapid growth in its Novice division. The group's further growth is largely capped due to an inability to secure additional ice times and have lost 6 to 10 players to boys' programs due to a lack of ice time. WGHA plans on sending an 'intent to register' letter to determine the degree to which COVID-19 could affect player numbers.
- WGHA is booking approximately 27 hours per week in Wilmot but have also been consistently renting 8 hours per week out of town in Tavistock and Plattsville, the latter of whom has a new junior team that will make use of that arena and could result in WGHA losing their time there. Arenas in Wellesley and St. Clements were previously used but no longer available to them at the desired time. The organization is presently booking 6:30am ice times in Tavistock and Wilmot which are undesirable for many people, particularly if having to drive out of town.
- Factoring out of town usage along with practice times booked independently by their competitive teams, WGHA estimates that they could book an additional 16 to 25 hours per week in Wilmot if provided the opportunity. Not only would this address current needs but also allow the number of senior level teams to grow. The group would also make greater use of spring season ice time

(April and May, if available) for rep tryouts as they book 14 hours out of town after ice is removed from the WRC.

- Further to the above point, WGHA reports renting the New Hamburg Community Centre for dry-land practices and training since it cannot access those same on-ice times at the WRC.
- In the absence of additional weekday ice, WGHA cannot grow its programs and will continue to turn players away. Of greater concern is a fear that their membership could actually shrink if they lose time at out of town rinks. The organization believes a third ice pad is needed in Wilmot, whether at the New Hamburg Community Centre or another location, noting that the former would be good as a practice pad or for adult leagues since minor games would be difficult due to lack of parking.

New Hamburg Firebirds

- The Firebirds are a Junior C team that use the Wilmot Recreation Complex for games and practices, and report strong satisfaction with the facility and a positive relationship with the Township. The team roster is capped at 23 players spanning ages of 16 to 21 that typically are using the program to move from Junior C to Junior B play, or are players that are no longer eligible for minor hockey programs.
- Home games are primarily played on Friday evenings with occasional Saturdays depending upon league and Township schedules. The team schedules one practice per week starting at 9:00pm that runs for an hour. The club suggested a desire to add one practice and extend each practice by half an hour, thereby adding a total of one hour of practice time per week, though the cost of rentals is presently prohibitive to doing so.
- Apart from the noted desire for more practice time, the Firebirds are satisfied with their current ice allocation. Although they would ideally have an earlier evening timeslot, they understand that minor hockey and skating programs need to be allocated times conducive to young children.
- The team does not presently practice out of town as their ice time needs are met locally and they have access to their own dressing room and equipment stored at the WRC.
- If the Township were to add a new ice pad, the Firebirds would be open to considering picking up additional practice time there if they can accommodate it in their annual budget. Although they would not have concerns with re-opening the New Hamburg Community Centre for ice sports (and would consider picking up limited ice time there), the team's preference would be to add a third ice pad at the WRC given that their dressing room and equipment is already onsite.
- The COVID-19 pandemic is the biggest threat facing the team right now due to many real and potential impacts. First and foremost is the availability of arenas in time for the 2020/21 season including the ability to schedule sufficient games for league play since that drives revenues for the team (through gate receipts, fundraising, and sponsorships). Practices will also be challenging in advance of the removal of physical distancing restrictions given scrimmages and skill development training are a central part of their preparation. In addition, the Firebirds may face challenges in fielding a competitive team (potentially also affecting gate revenues) should out-of-town university and college players not return due to online learning proposed for Ontario's post-secondary institutions in the coming year.

Arena User Group Survey

Individual comments provided by these groups have been factored into the needs assessments, with a general summary of common themes contained below:

- Certain groups reported that their ability to grow is limited by their current ice allocation, in particularly hindering teams at the senior and competitive levels. Selected groups report booking ice and dry floor time in other municipalities.
- Further to the above noted point, some groups report that their membership could grow if provided with more desirable ice times (e.g. early evening).
- Half-ice requirements under Hockey Canada's LTAD model are great for skill development but are creating challenges with purchasing and storing equipment (e.g. temporary rink boards).
- Concerns were expressed about the effects of the COVID-19 pandemic on operations and participation rates.
- Certain comments were made regarding facility maintenance, cleanliness, scheduling practices, fees, etc. noting that these operational elements are not included as part of this report's scope of work. These comments have been passed onto Township staff.

37 to 56 Hours

Additional hours per week that boys and girls minor hockey (and Junior C club) estimate they could collectively rent in Wilmot if available.

3.2 Summary of Requests for Additional Ice Time

Based on the stakeholder interviews, the following table identifies the number of additional hours requested through this Analysis by local youth groups for the upcoming season.

Table 1: Requests for Additional Hours per Week, 2020/21 Winter Season

Organization	Allocated Weekly Ice Time for 2019/20	Additional Hours Requested for 2020/21
New Hamburg Hockey Association	71.5	20 to 30 hours
Wilmot Girls Hockey Association	26.5	16 to 25 hours
New Hamburg Skating Club	15.5	0
New Hamburg Junior C Firebirds	5.0	1
Adult Teams	17.5	Not interviewed
Public Skating / Shinny	11.0	Not applicable
TOTAL	147.0	37 to 56 hours per week

Notes: (1) includes prime and non-prime time allocations.

(2) Certain groups indicate that the ongoing COVID-19 pandemic and resulting adjustments to arena operating hours and physical distancing measures could impact registrations for the 2020/21 season. Their estimates of additional ice time needs are generally based on pre-pandemic participation rates.

In total, Wilmot's primary youth-serving organizations indicate that they can collectively utilize 37 to 56 hours of additional ice time on a weekly basis during the winter season to better accommodate their existing

programs. This represents an increase of 30% to 47% in ice time from the four primary groups. Based on feedback provided by the groups, much of this time is likely to be required for additional practice time for minor hockey teams (boys and girls). Should the Township of Wilmot be able to supply this amount of additional ice time, it would also replace the NHHA and WGHA out-of-town rentals (currently 15 hours per week plus individual team rentals).

The cost of ice rentals along with where a group’s allocation occurs within the primetime window is 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 growth-related demands, which are discussed in Section 4.0.

3.3 Ice Utilization

For the purposes of this analysis, the winter season spans September to March when demand for local youth ice sports is greatest. Weekly arena usage data for the 2017/18, 2018/19 and 2019/20 winter seasons was provided by the Township to demonstrate historical usage trends. This data was not impacted by the COVID-19 shutdown, which occurred near the end of the 2019/20 season.

According to Township staff, weekly arena schedules are generally representative of the entire ice season, although there may be fluctuations throughout the winter season due to one-off rentals, special events, tournaments, and holidays.

It is further noted that the data presented in this section represents the ice time that is scheduled and not what is actually used, although turned back ice time is rare. Bookings by Waterloo Oxford Secondary School are excluded though Township staff indicate that this school books 82 hours of non-prime time ice per season.

Summary of Ice Utilization

Based on the Township’s ice schedules, prime time arena utilization has remained strong over the past three years, which is consistent with the findings from the 2013 Study and 2017 Master Plan.

With a prime time utilization rate of 92%, the WRC’s two ice pads are operating near full capacity.

There are limited opportunities to accommodate additional usage during prime time hours. Usable blocks of open prime time hours are typically available during the early hours (e.g., 6am) and late hours (after 10pm) during the weekend; however, certain groups view these as less desirable to users or too late for youth.

The Township’s parameters for prime and non-prime time ice are defined as:

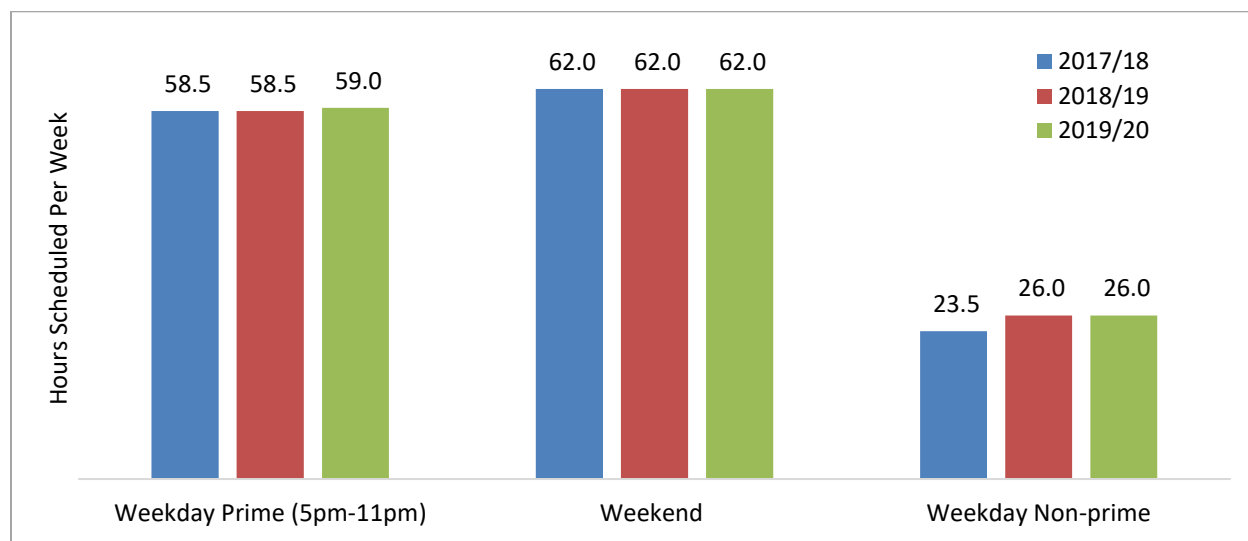
Prime Time Hours		Non-Prime Time Hours	
Monday to Friday:	5:00 pm to 11:00 pm	Monday to Friday:	6:00 am to 5:00 pm
Saturday and Sunday:	6:00 am to 12:00 am		11:00 pm to 12:00 am

Wilmot achieved a prime time utilization rate of 92% during the most recent 2019/20 winter season, representing a marginal increase of one percent from the 2017/18 season and has generally held steady at this level for the past five years. This is indicative of an arena system operating at full capacity during prime time as remnant time slots are typically a few half hour blocks. The only ‘useable’ available prime time hours (i.e., minimum block of one hour) that remain at the WRC are on weekends during the early mornings (6:00am) and late nights (after 10:00pm). These times are not suitable for most youth programs, particularly younger age groups.

Figure 1 and Figure 2 illustrate the WRC weekly ice usage profile by time of day. Analysis of the arena schedules for the past season revealed that:

- Of the 60 weekday prime time hours that are provided across the WRC's two ice pads, 59 hours were allocated amounting to 98% of available time;
- Of the 71.5 weekend prime time hours (excluding flooding), 62 hours were allocated amounting to 87% of available time; and
- Of the 105 non-prime time hours (excluding maintenance and flooding), 26 hours were allocated amounting to 25% of available time.

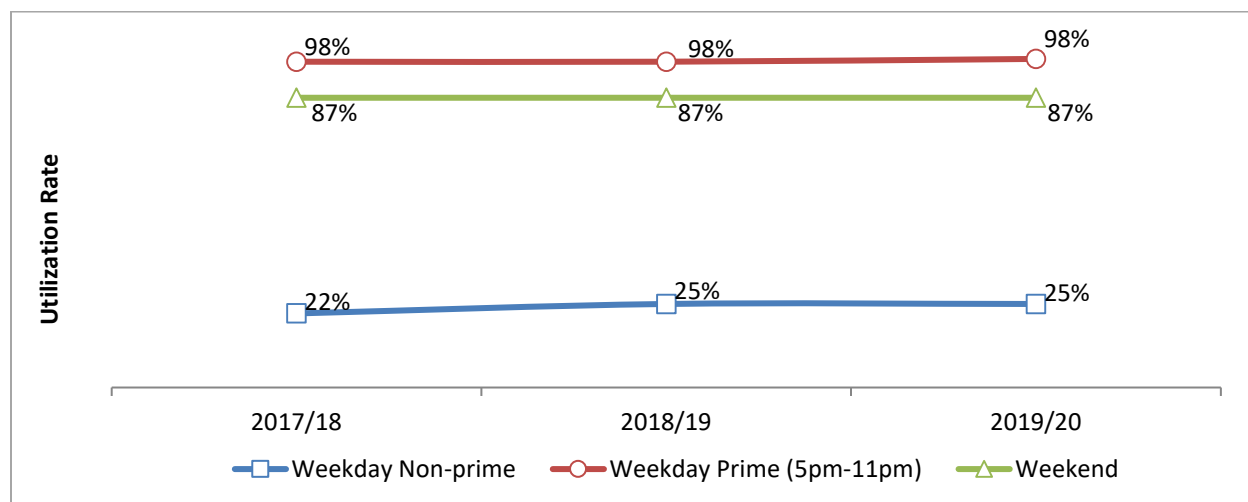
Figure 1: Wilmot Recreation Complex Weekly Winter Ice Schedules (in hours) by Time of Use, 2017/18 to 2019/20



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

Source: Township of Wilmot

Figure 2: Wilmot Recreation Complex Arena Utilization Rate per Winter Season, 2017/18 to 2019/20



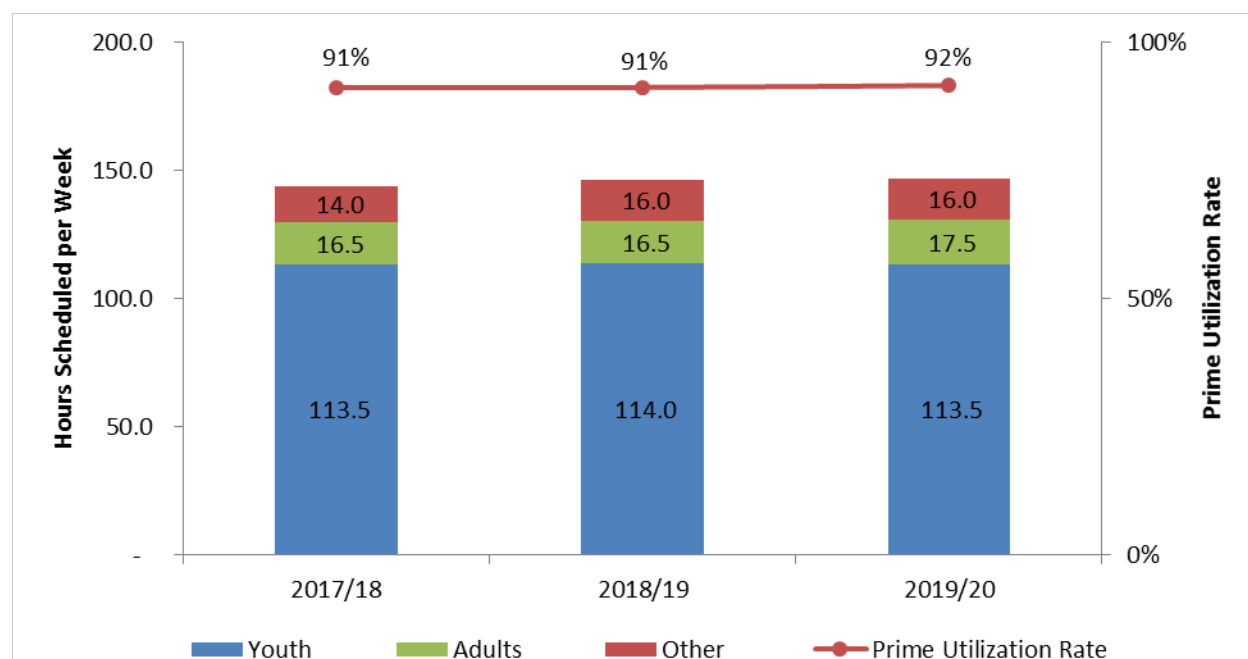
Data reflects all hours scheduled in a typical week (including prime and non-prime); some variation may occur from week to week. Ice maintenance is excluded.

Source: Township of Wilmot

Figure 3 summarizes the weekly prime and non-prime ice allocation by type of group over the past three ice seasons. An analysis of the Township's weekly ice schedules found that:

- Scheduled youth groups (e.g., minor hockey, girls' hockey and figure skating) consistently received approximately 114 hours per week, despite changes to their membership.
- Scheduled adult groups (e.g., leagues, adult rentals, etc.) increased by one hour, though the Township has received numerous requests from adult groups that could not be accommodated. The requests primarily consisted of men's leagues displaced by the temporary closure of the Wellesley Arena, extra ice time for Huskies teams, birthday parties, etc.
- Other scheduled groups and public skating allocations increased by two hours to 16 hours per week as a result of additional non-prime shinny offerings in 2019/20.
- Compared to the 2013/14 season when the last detailed Analysis was prepared, youth organizations have received 7.5 more hours allocated to them per week while adults have 4.5 fewer hours each week. This illustrates the efforts of staff to accommodate growing youth programs, which has potentially led to the displacement of certain adult groups.
- There has been a modest increase in non-prime time bookings that occur on weekday mornings and afternoons. Wilmot's non-prime time usage rate has historically been in the range of 20% to 25%, which is comparable to other municipalities since the majority of arena users cannot be reasonably expected to book ice time during normal business and school hours.

Figure 3: Wilmot Recreation Complex Weekly Winter Ice Schedules (in hours) by Type of Group, 2017/18 to 2019/20



Data reflects all hours scheduled in a typical week (including prime and non-prime); some variation may occur from week to week
 "Other" category consists of the New Hamburg Firebirds, Shinny and Public Skate
 Source: Township of Wilmot

3.4 Participation Rates

In addition to hours rented, the number of participants registered in ice sports is another complementary indicator of demand. In particular, minor ice sport registrations drive prime time needs for the most desirable or peak times.

Based on data provided by the primary youth-serving user groups, the total number of youth users in Wilmot has increased by 83 participants (8%) compared to three seasons prior; compared to youth registrations from a decade prior, there are approximately 260 more youth participants (30%) in the Township.

Using an estimate of approximately 4,200 persons between the ages of 5 and 19 in Wilmot,⁷ based on the number recorded through the 2016 Census and escalated by the Township's average annual growth rate, then 27% of children and youth participate in organized winter ice sports (the upcoming 2021 Census should be used to update this age-related assumption in the absence of a current estimate). Wilmot's ice sport participation rate continues to be on the upper end of the range in comparison to other municipalities and reinforces the notion brought forward by local arena users that the demand for their programs is strong.

Table 2: Registration in Organized Ice Activities – 2017/18 to 2019/20

	2017/18	2018/19	2019/20
Youth Registration			
New Hamburg Hockey Association – NHHA	560	600	590
Wilmot Girls Hockey Association – WGHA (youth only)	242	252	255
New Hamburg Skating Club – NHSC	235	270	275
New Hamburg Junior C Firebirds	23	23	23
Subtotal – Youth	1,060	1,145	1,143
Other/Adult Registration			
Wilmot Girls Hockey Association (Senior B)	18*	18*	18
New Hamburg Hockey Association (U21)	25*	25*	25
Adult Leagues / Teams (estimated)	no data		381**
Subtotal – Other/Adults	no data		424
TOTAL	-	-	1,567

* estimate based on reported 2019/20 registration

** provided by the Township of Wilmot based upon fall/winter rentals

⁷ Based on 2016 Census population and assumes 1.5% annual compound growth rate

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

- The number of minor hockey (boys) registrants has been steadily increasing with 100 new players (+20%) compared to when the 2013 Arena Needs Analysis was prepared. Comparatively, girls' hockey participation, which had the greatest rate of growth recorded in the 2013 Arena Needs Analysis, has levelled off with a more nominal increase of 14 players (+5%) based on current registration. While half ice play may allow certain age divisions to take on more registrants, the limited supply of early evening timeslots at the WRC may constrain further minor-level growth.
- Registration in figure skating has increased by 40 skaters (+17%) in the past three years after a period of general stability following the 2013 Arena Needs Analysis. Growth has been driven by CanSkate and Powerskate programs which comprise 90% of the NHSC's current registration.

Given the forecasted increase of the youth population to 2031, it is reasonable to expect that Wilmot's minor ice sports and skating programs will continue to attract more participants over time.

While children and youth constitute the primary users of ice time in Wilmot, consideration should also be given to the adult market. Registration data for adult users is not formally collected by the Township though estimates place prime time users at slightly below 400 players. As shown in the preceding charts, adult groups rented approximately 17.5 hours per week in 2019/20 – a decrease of 4.5 hours since the 2013/14 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 a number of municipalities with similar characteristics, the allocation of youth versus adult bookings in prime time is generally 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. 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. This is indicative of an arena system that is operating near peak capacity and where youth are assigned priority to access the most desirable hours. Over time as the population ages, it is possible that this ratio will change in favour of adult ice users.

It is also noteworthy that 5% of Wilmot adults between the ages 20 to 49 are involved in ice sports, in line with provincial norms that suggest the same. This suggests that there is nothing unique about adult demand in the Township and that adult participation should fluctuate at a rate similar to population growth in this age cohort, all other factors being equal.

3.5 Comparison to National & Provincial Trends

Based upon the review of pressures that are impacting Wilmot's arena stakeholders along with local participation rates and use of ice, there are areas of the local arena system that align with trends found across Canada but also certain deviations. Municipalities across the country are grappling with infrastructure deficits, namely the escalating costs of repairing and/or updating their aging arenas; while Wilmot was proactive in building the Wilmot Recreation Complex to reduce/defer some of its asset management obligations for the New Hamburg Community Centre, the latter building remains an active building in the Township's portfolio of facilities. That said, arena users have access to a high quality twin pad arena at the WRC that employs a modern design reflecting best practices in design (e.g. arena seating, adequate number and size of dressing rooms, accessibility for persons with disabilities, etc.).

Participation in hockey and figure skating at the national and provincial levels has been in a general decline for over a decade; minor/youth participation levels have been negatively affected by factors internal and external to the sport which can range from:

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

Fortunately, Wilmot-based arena organizations have been able to grow their registrations as a whole in spite of the broader regional and provincial trends. This may be attributable to a combination of the organizational strength/capacity of local arena groups, continued interest in ice sports among Wilmot residents, an influx of young families in the community which has sustained the important 5 to 19 year age group, and an ability to service urban populations living in the eastern communities of Kitchener-Waterloo as well as surrounding rural populations in area municipalities. Conversations with certain arena stakeholders also note that their ability to access convenient ice times has been a positive factor in maintaining/growing their registrations.

Recommendation #12 of Wilmot's Parks, Facilities and Recreation Services Master Plan references the need for the Township to monitor arena participation and utilization trends to ensure that the demand for ice is sustained, particularly if national headwinds are affecting Wilmot.⁸ In the three years since the Master Plan was prepared, local participation rates and utilization levels have not waned. So long as Wilmot-based groups can continue to sustain their registration rates at a pace similar to or above the rate of population growth in the Township, continued demand for arenas and ice time can be expected.

⁸ Township of Wilmot. 2017. Parks, Facilities and Recreation Services Master Plan. p.48

4.0 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 future population characteristics, current and projected utilization, and “provision targets” based on a combination of accepted standards of play, market-driven factors, stakeholder input, and other local circumstances.

4.1 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 the following core assumptions relating to participation and population growth including:

- Population growth will occur as identified in Section 2.0 of this Analysis.
- Participation rates in hockey, figure skating, and their related disciplines will grow in proportion to population growth over the course of the planning period.

Changes in the Region of Waterloo’s population forecasts along with the impacts of the COVID-19 pandemic on population growth and ice sport participation rates are two notable factors that could impact the estimated ice demand for Wilmot. Therefore, it is recommended that the population projections, ongoing registrations / participation rates, and their collective impact on the needs assessment should be closely monitored over the coming years.

With the above noted assumptions 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. Between the current season and 2031, overall registration in local youth and adult ice organizations is anticipated to grow from 1,567 to 2,085 – a 33% increase (518 registrants). The number of youth participants is forecasted to grow by 32% (approximately 400 registrants) and the number of adult participants is forecasted to grow by 34% (approximately 100 registrants).

Table 3: Projection of Registered Ice Sport Participants, Township of Wilmot (2012/13 to 2031)

	Actual	Forecast	
	2019/20	2026	2031
Youth/Core Registrants (based on a 27% participation rate for residents ages 5 to 19)	1,143	1,400	1,550
Adult/Other Registrants (based on a 5.5% participation rate for residents ages 20 to 49)	424	490	535
Total Registrants	1,567	1,890	2,085

Note: the impact of the COVID-19 pandemic on local and regional participation rates will need to be monitored.

4.2 Applying the Provision Target

Wilmot's 2017 Parks, Facilities & Recreation Services Master Plan establishes a provision target of 1 ice pad per 450 registered youth (ages 5 to 19) to guide arena planning, reconfirming the metric that the Township has used since 2013. This target continues to be the preferred approach because it considers participation trends, population growth, and demographic factors.

The provision target of 1 ice pad per 450 registered youth assumes the following:

- that youth will continue to use the large majority of prime time hours;
- that the Township will attempt to accommodate modest 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 for local programs); 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).

The following table illustrates application of the preferred provision target, assuming the existing rate of participation is maintained (i.e., at 27%) and that the youth market segment (age 5 to 19) changes at the forecasted rate. This analysis identifies a deficit of 0.5 ice pads at present, growing to 1.4 additional ice pads by 2031. Interestingly, this deficit of 0.5 ice pads generally equates to 30 to 40 hours of pent-up demand which is consistent with the request from major arena users.

Projection of Ice Pad Needs, Township of Wilmot (2019/20 to 2031)

	2019/20	2026	2031
Forecasted Number of Youth Registrants	1,143	1,400	1,550
Number of Ice Pads Required (based on 2 pads at present and a provision target of 1 ice pad per 450 youth registrants)	2.5	3.1	3.4
Additional Ice Pads Required	0.5	1.1	1.4

2.5 Ice Pads

The level of demand that this Report and previous arena assessments identify as the "trigger" to initiate site selection and construction of a third ice pad in Wilmot.

Growth in Wilmot's arena market is now projected to occur at a faster rate than previously contemplated through earlier arena planning assessments, therefore, pressures for a third ice pad are more immediate. An accelerated forecast of ice sport participants is driven by the continued strength in local ice sport participation rates along with an accelerated population growth forecast as a result of the Township's infrastructure servicing capacity gains along with new provincial growth forecasts.

The recommended timing for constructing a new ice pad is discussed in Section 4.3. The Township has reached the demand threshold (2.5 ice pads) at which the 2013 arena analysis recommended the provision of the third ice pad.⁹ Municipal best practices - contingent upon a number of market factors - are such that

⁹ Township of Wilmot. 2013. Indoor Arena Ice Usage and Needs Analysis. p.23.

arena construction is initiated shortly prior to need for a full ice pad being realized in order to allow demand to “grow into” a new facility and avoid displacing or unduly restricting growth-related needs of local arena organizations.

That being said, there are indications from the Region of Waterloo that the Township’s overall 2031 population target of 28,500 persons may be pushed out towards the year 2041 due to lower rates of population growth compared to those projected through the provincial Places to Grow. Combined with the potential of the COVID-19 pandemic to further delay residential growth, new population forecasts and 2021 Census data could have a bearing on the above noted arena market projections.

4.3 Timing of Future Ice Surface Needs

The Town’s proactive efforts in regularly conducting assessments of its arena system have resulted in a number of benefits, including sound and sustainable capital planning that is tied to market needs. Preceding master plans and studies identified the need for a third ice pad around the year 2018. **The current deficit of 0.5 ice pads (and growing) is a level that supports provision of a new ice pad as early as 2021/22 and would allow the community to quickly maximize use of the facility.**

Previous iterations of the Arena Needs Analysis and Master Plans identified risk factors such as declining province-wide participation rates in ice sports. Wilmot has largely withstood these market trends and in fact could be growing its participation rate, thus this Analysis finds sufficient justification to add the third ice pad.

Consistent with previous assessments, needs for a new ice pad could be addressed by (in no particular order):

- **Re-commissioning the New Hamburg Community Centre arena** – this has the potential to be ready as early as the 2021/22 season depending upon the works required to restart arena operations;
- **Expanding the Wilmot Recreation Complex** – this is subject to further study regarding viability and ability for the site to accommodate an expansion, as well as determining capital costs and construction timelines; or
- **Constructing a new arena (with ability to be twinned to include a fourth municipal ice pad)** – this option is subject to further study regarding viability; costing and timelines have not been assessed.

It bears noting that the projection model in this Analysis anticipates the third ice pad as being at capacity in five years (Section 4.2); however, forecasted need in 2031 would not quite be at the level to recommend a fourth ice pad. Although there may be financial economics of scale associated with simultaneously constructing a fourth ice pad (e.g. twin pad arena), the 12 to 15 year time period in which the fourth pad is projected to be needed (post-2031) carries a financial risk if a fourth ice pad is built prematurely (i.e. capital, operating and lifecycle replacement costs that are not aligned with demand).

4.4 Summary of Recommendations

The following recommendations are made based on the preceding analysis:

1. Continue to target 1 ice pad per 450 registered youth participants (ages 5 to 19) in the planning for current and future ice surface needs, consistent with the Parks, Facilities & Recreation Master Plan and the previous Ice Needs Analysis. Based on this target and a continuation of existing participation rates, there is a deficit of ice at present (equivalent to 0.5 ice pads), growing to 1.1 ice pads by 2026 and 1.4 ice pads by 2031.
2. Provide one additional ice pad as early as the 2021/22 season. It is anticipated that the findings of this Analysis 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 Analysis.

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). Potential strategies may include (but not necessarily limited to):

- rehabilitation of the New Hamburg Community Centre as a winter ice venue;
 - an expansion to the Wilmot Recreation Complex; or
 - new construction at an alternative site, with capacity for a fourth municipal ice pad (to be determined through future arena assessments).
3. Review potential implications of COVID-19 on arena participation and utilization rates as they pertain to short-term arena demand. The need for a fourth ice pad should be confirmed based on arena market factors including (but not limited to) the rate and timing of population growth (with emphasis on growth in the 5 to 19 age group), changes to participation rates, additions or removals of ice pads from the regional arena supply, changes to user group programming requirements and capabilities, etc.