

ARENA NEEDS ASSESSMENT

M.D. OF FOOTHILLS - MAY 2016



McElhanney

McElhanney Consulting Services Ltd.,
500-999 8th Street SW, Calgary, AB, Canada T2R 1J5
Phone: (403) 774-9564 | gdebney@mcelhanney.com
www.mcelhanney.com

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1.0 INTRODUCTION

In late 2014 the M.D. of Foothills retained McElhanney Consulting to prepare two reports. The first was to be an update of the 2012 Recreation Facility Development Plan and the second was an Arena Needs Assessment. This report contains the data gathered and analyzed for the Needs Assessment, to evaluate the practicality and timing of a future recreation facility. A component of the study involved extensive community and user group consultation.



Scott Seaman Sports Rink, Heritage Heights, AB

2.0 CONSULTATION

Community Consultation Summary

Members of the North West Foothills Recreation Board and M.D. administration worked to ensure that all residents and user groups would have the opportunity to make their voices heard. A consultation plan and communication strategy was developed and implemented. Over the course of six weeks the following steps were taken:

- Prepared stakeholder survey
- Compiled stakeholder list
- Prepared public survey
- Personally contacted to inform stakeholders of survey
- Emailed stakeholder survey
- Follow up call prior to survey closing
- Created email/telephone network list
- Development of newsletter
- Advertisement in newspapers and local bulletins
- Taxpayer mail out

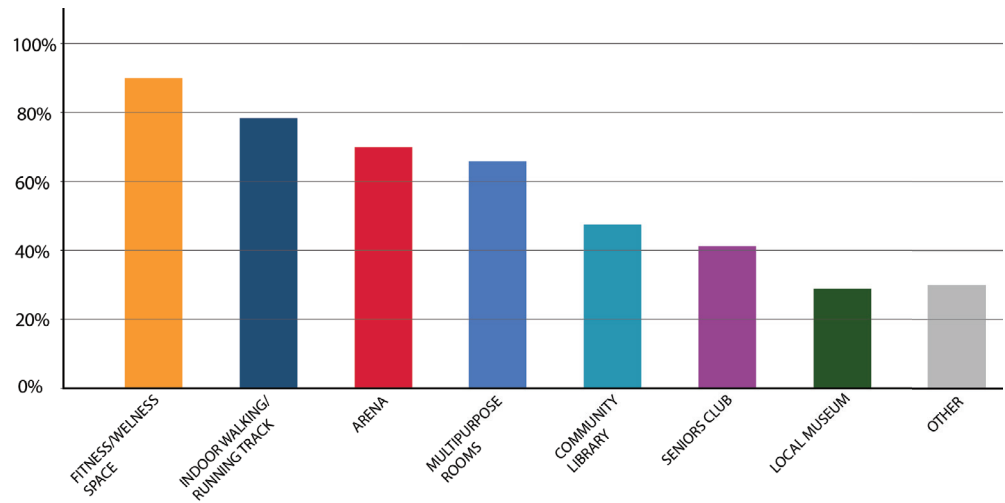
To communicate with residents, user groups and other stakeholders, the consulting team conducted interviews in addition to a stakeholder and public online surveys. There were 24 surveys sent out to key stakeholders with 20 returned. The Community Survey was sent out to residents in Electoral Divisions 3,4 and 5. It saw over 450 surveys completed for a total of 15% of households being represented. Results of both surveys are listed in the appendices.

Community Survey Highlights

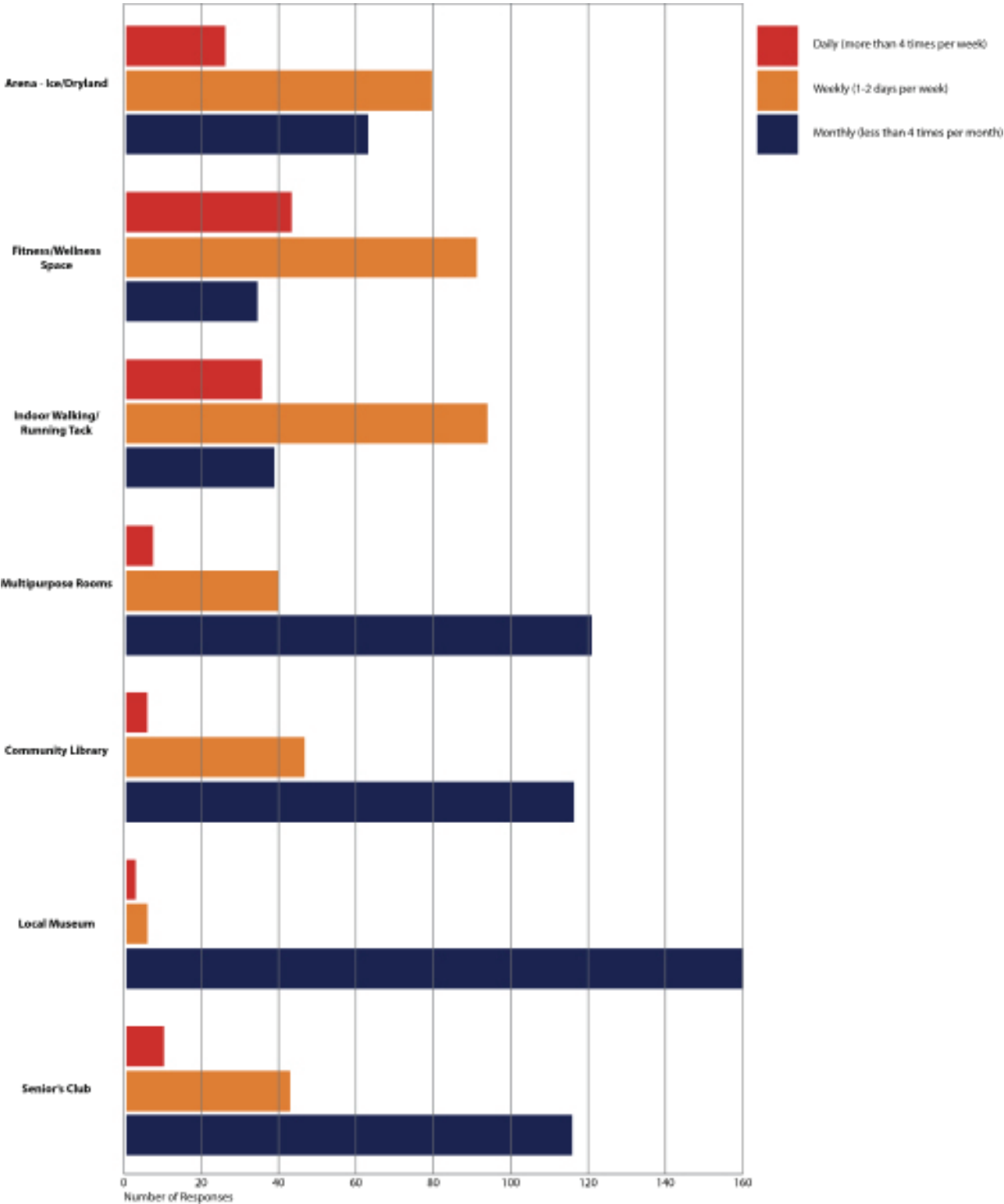
WOULD YOU SUPPORT HAVING DEVELOPMENT OF AN ACTIVE LIVING RECREATION CENTRE MOVE FORWARD AT THIS TIME?



WHAT FACILITIES WOULD YOU LIKE TO SEE INCLUDED IN THE ACTIVE LIVING RECREATION CENTRE?



ON AVERAGE, HOW OFTEN WOULD YOU AND YOUR FAMILY USE THE FACILITIES THROUGHOUT THE YEAR?



These numbers show the projected number and frequency of uses that respondents predict they would use various facilities in a new Active Living Recreation Centre. If these numbers are used to predict anticipated use the three activities that would see the most use, respectively, are: fitness/wellness space, indoor track and arena.

3.0 ARENA DEMAND

Calculating Arena Capacity

Each arena operates in a slightly different fashion. Capacity is calculated based on prime time and non-prime time operating hours and the numbers of weeks operated per season. The average number of prime time hours per season is 1608 and the consultants consider 80% usage as full capacity. Very few facilities attain 100% usage due to the drop off for use in the early mornings and late evenings, as well as time required for ice resurfacing and maintenance.

The chart below represents the average operating format for an indoor rink:

Rink Operating Format				hrs / year
Weekdays	NPT	7am - 4pm	9 hours x 5 days x 24 weeks	1080 hrs
Weekdays	PT	4pm - 11pm	7 hours x 5 days x 24 weeks	840 hrs
Weekends	PT	7am - 11pm	16 hours x 2 days x 24 weeks	768 hrs
			TOTAL HOURS	2688 hrs

PT: Primetime
NPT: Non Primetime

Existing Arena Capacity

The Foothills Region has seven full size rinks, one half rink in High River as well as one outdoor refrigerated rink (covered in 2015) in Black Diamond, which is factored into this study as a half rink. In total this equals 8 full size rinks with an additional 1.5 set to come online in Okotoks. Utilizing the full time rinks we calculate that 10,943 hours of an available 13,364 hours are used annually. This represents 82% usage of prime time hours.

The High River small rink experienced a significant drop in usage during the 2014/2015 season as the Blackie and High River minor hockey programs merged. This merger made more ice available in Blackie and thereby reduced bookings in High River. During the 2014/2015 season only 30% (642 hours) of prime ice time was used at the smaller rink. Operators will likely not see a dramatic increase in the number of hours booked over the next few years.

The Black Diamond outdoor rink has not been able to provide a reliable ice surface to accommodate long term bookings. The 2014/2015 season had the highest use since its opening in 2008 with 250 hours (16%) of prime time ice being used. In 2015 a roof was added over the ice surface, which eliminates most of the barriers to use. Operators forecast an increase of 750 hours over the next three years that will bring usage to 1,000 of 1,608 hours for 62% usage. At this capacity the Black Diamond rink will be able to add enough hours for consideration as half of an indoor ice surface.

Arena Optimization Analysis

Minor hockey is the largest user of ice time and is a good indicator for predicting future ice needs. For the 2014/2015 season the High River Blackie minor hockey programs amalgamated because their programs were seeing little to no growth each year. The amalgamation caused some programs to move from the small ice in High River to Blackie due to a more suitably sized ice surface for older age groups. This caused a dramatic reduction in the use of the High River small ice surface. High Country Minor Hockey is beginning to see slow growth after having experienced some declines in the past. Okotoks Minor Hockey will have to again cap in 2016 due to a shortage of ice. Their current need is for two more ice surfaces at between 60 and 70% of prime time ice.

Existing Situation including High River small rink and Black Diamond Outdoor rink				
	Total Prime Time	Prime Time Used	Surplus	Surplus %
Blackie	1529	1082	447	29
High River Main	2085	1797	288	14
High River Small	2085	642	1443	69
Okotoks 1	1935	1935	0	0
Okotoks 2	1935	1935	0	0
Okotoks - Centennial	3456	3456	0	0
Heritage Heights - SSSR	2212	2212	0	0
Black Diamond	1608	1292.5	315.5	20
Black Diamond Outdoor	1529	250	1358	84
Total	16932	11933.5	4998.5	39

Note: 10% (1693 hours) are available for use at the High River Small rink and Black Diamond outdoor rink. These calculations do not include addition ice under construction at the Okotoks Centennial Arena (1 surface) and outdoor ice in Okotoks (non-boarded).

The outdoor rink in Black Diamond has a roof for the 2015-16 ice season. Previously, about 250 hours of prime time ice were used during the 22 week season. With the roof the operator believes up to 1,000 hours would be used. This would bring the ice availability up by 750 hours or slightly less than 50% of one rinks prime time ice availability.

If ice needs are looked at regionally, the southern end of the M.D. of Foothills has availability at both Blackie and the High River small ice surface. This would handle ice demand for the foreseeable future. High River is initiating a new Master Recreation Plan exercise that will forecast when a new recreation complex may be built. However, it is not anticipated that anything new will be built in the next 10 to 15 years.

The central area of the Foothills region will need two new rinks in the next 10 years to meet growing demands for ice. The greatest cause of the increase in demand has been growth of the Okotoks Minor Hockey Program. Prior to the opening of the Scott Seaman Sports Rink the program was capped due to a lack of facilities. Even after the Scott Seaman Sports Rink opened in 2013 the program still traveled as far as Stavelly for ice time. The north end of the M.D. is well served in the east with the new rink at Heritage Heights. The NW population, however, travels to Black Diamond and Okotoks for ice related activities and to Aldersyde for indoor soccer.

Gap Analysis

All seven of the existing full size indoor rinks with the M.D. of Foothills are considered to be at full capacity. The High River small ice will not add more users until the Blackie facility is full. Foothills Minor Hockey does not forecast major growth but also does not anticipate declines in the future. The Black Diamond outdoor rink has a roof over it for the 2015-16 season. As mentioned previously this will generate another 750 hours by the end of the 2017-18 season that should be absorbed by minor hockey groups, bringing total prime time usage for the rink to 65% capacity.

The Okotoks Minor Hockey ice summary indicates that they need another two complete ice surfaces to meet their current needs. Oilfields Minor Hockey projects a small increase in growth each year. The Foothills Pond Hockey League, which has teams from Priddis and Millarville is desperately in need of ice time to accommodate the growth of their program.

There are developments north of the M.D. which may offer future ice capacity to residents living in the northern portion of the District. Tsuu T'ina is developing the All Chiefs Recreation Complex, which will add two new ice surfaces and another twin arena in the future. There are also plans for a recreation complex in the new south Calgary neighbourhood of Providence.

Impact of Demographic Change on Future Use

The M.D. of Foothills has an aging population. The chart below highlights the M.D. in comparison with Alberta and Canadian median ages. A more detailed analysis is included in the Recreational Facility Development Plan.

	2006 Median Age*	2011 Median Age*	2016 Median Age
Alberta	36	36.5	37
Canada	39.5	40.6	41.21
M.D. of Foothills	43.1	45.4	47.8

Data Source: Statistics Canada 2006 and 2011 National Census data

From 2006 to 2011 the total Foothills regional population grew 22% to 63,226 from 51,409. The 2015 population is estimated at 71,804 or 13% growth from 2011. The fastest growing urban centres are Okotoks, High River and Black Diamond. If a population standard of 1:9,000 (see Recreation Facility Development Plan) is used to project arena need a total of one new arena may be needed by 2020.

Arena Need

The greatest percentage of use at each facility in the M.D. comes from minor hockey programs. Both the High River and Black Diamond programs are expected to remain constant in the amount of players registered. Okotoks has the largest program and forecasts consistent growth for the next five years.

Utilizing the Recreation Facility Development Plan and data presented below, the following chart represents the anticipated number of rinks needed in the M.D. of Foothills over the next 20 years.

YEAR	PROJECTED REGIONAL POPULATION	RINKS NEEDED (based on 1:9,000 pop. standard)
2015	71,804	0
2020	83,335	1
2025	94,412	1
2030	105,791	1
2035	116,969	2

Note:

- Black Diamond and High River's small rinks as well as Okotoks Leisure Rink are considered as 0.5 each
- 2 rinks are under development in Tsuu Tina Nation. It is assumed that local and Calgary users will quickly take this ice time. Two additional rinks are planned for the future. The old T'suu Tina ice will be phased out when the new ones are completing, for a total of 2 additional ice surfaces from the current offer.
- Okotoks is planning 1.5 new rinks (one rink and one leisure ice).
- The planned community of Providence in Calgary will likely have recreation facilities once it is built out.

Financial Viability of Arena Operations

The Blackie arena had greater revenues than in previous years due to the amalgamation of the High River and Blackie minor hockey programs. These gains were met by losses at the High River facility and their operating recovery was reduced. High River is starting a facility plan that will be completed later this year. Considered in the plan is a new twin full size arena and the re-purposing of the existing rinks, which would add 0.5 rinks to the regional inventory.

Best Practices

The Scott Seaman Sports Rink at Heritage Heights has one of the highest recovery rates due to the hockey program at the adjacent school. Day time use from these type of programs has helped many facilities. The inclusion of other amenities at the facility can generate revenue through bookings or other complimentary uses. Another consideration is to reduce rates for the prime time hours that are difficult to sell at the full rate. Increased revenue is also achieved through adding the cost of flooding time to rental agreements.

Dry pad use can be maximized by planning for inserts in the floor to allow for games like tennis, badminton and volleyball. Basketball standards can be the collapsible types on side walls. Lacrosse, ball hockey, inline hockey and other similar users can bring additional revenue in the off season.

4.0 IMPACTS ON OILFIELDS ARENA & SCOTT SEAMAN SPORTS RINK

Additional ice surfaces added in Okotoks and/or Millarville will meet current needs only, and not keep pace with additional demand resulting from population growth in the area. It is estimated that Black Diamond will add 750 hours or \$50,000 to their revenue stream with their covered outdoor rink. This will reduce the operating deficit considerably. If the planned Millarville rink were to open in 2025 it is forecasted to be used 1,300 hours per year and would decrease usage at the Black Diamond Oilfields Arena by 0-10%.

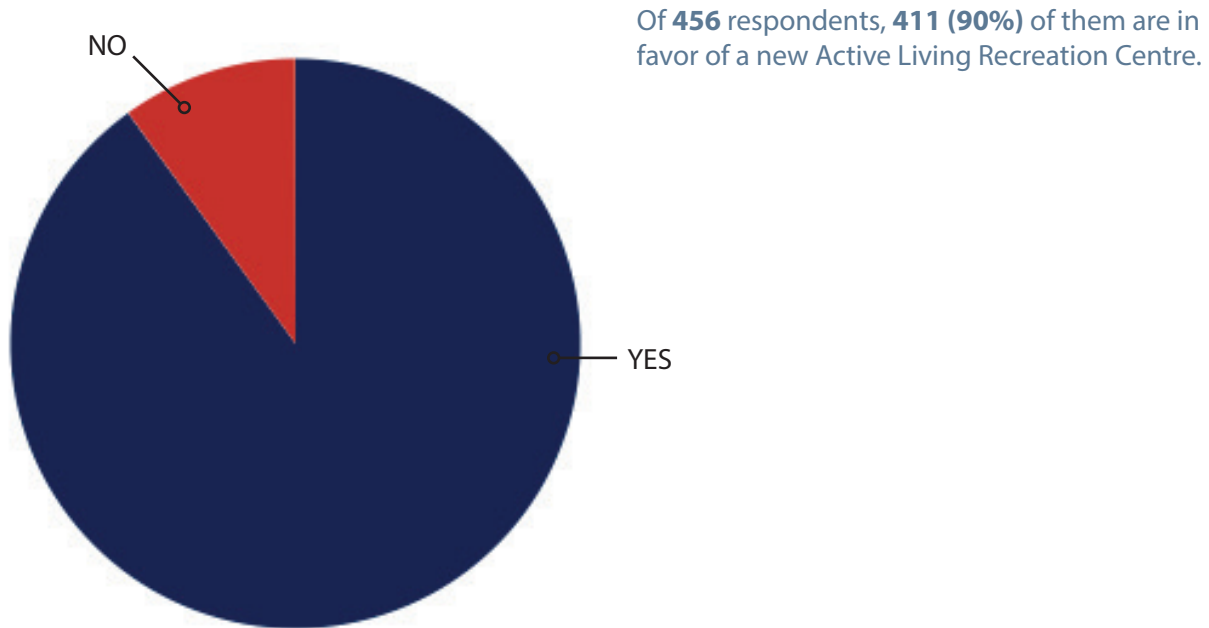
The extra ice needed by Okotoks Minor Hockey can be met by adding 1 rink at the Centennial Arena and partially by the additional ice available from the covered outdoor ice surface in Black Diamond. If the Black Diamond covered rink is enclosed in the future and additional 300 hours would be made available and would most likely be picked up by minor hockey groups.

Appendices

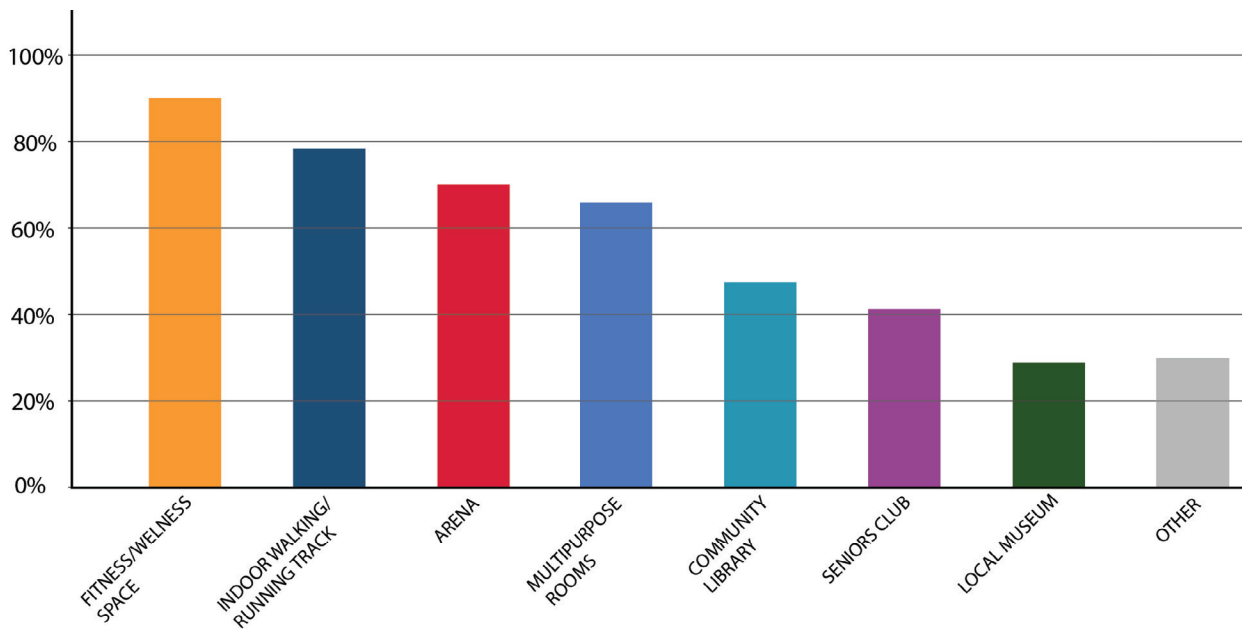
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1. COMMUNITY SURVEY RESULTS

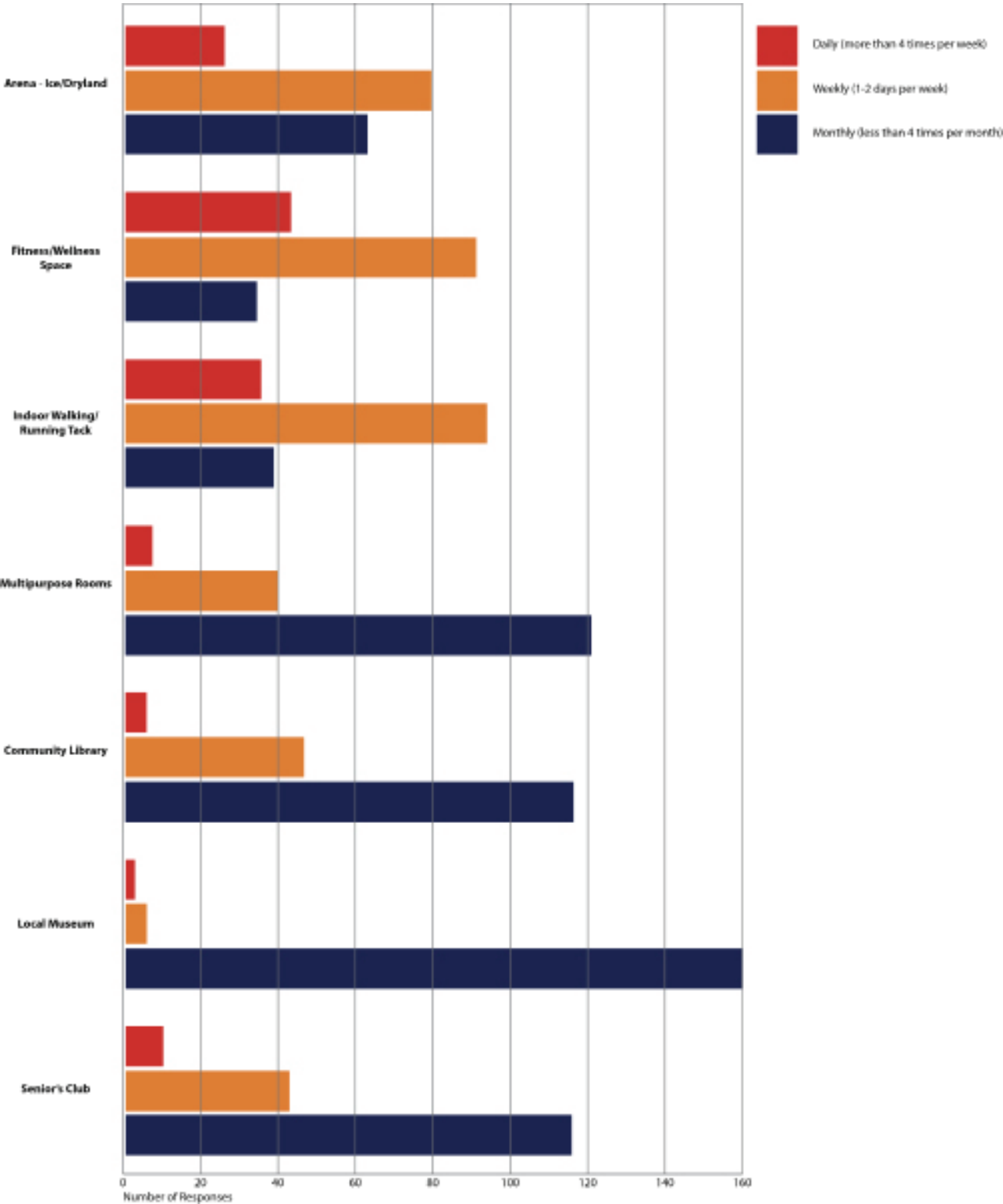
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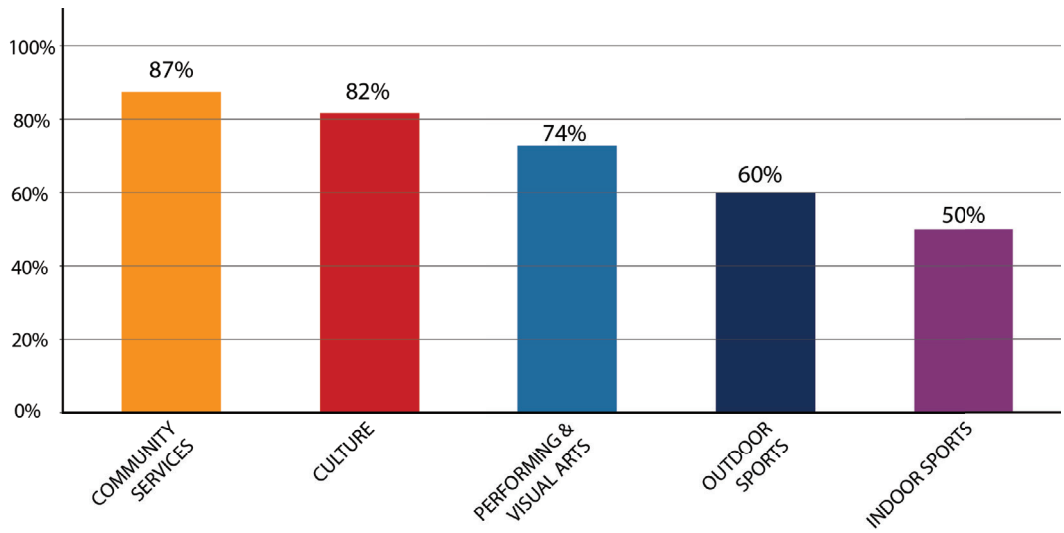
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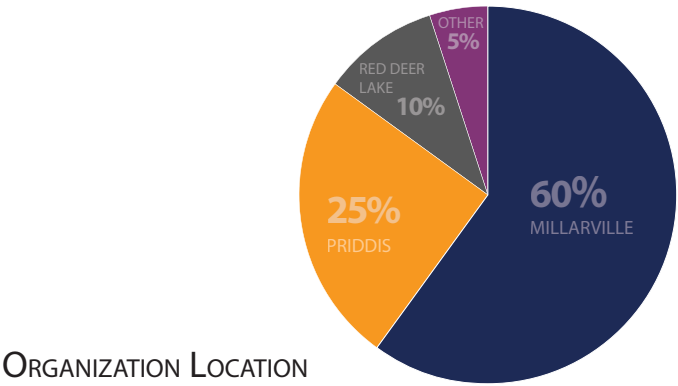
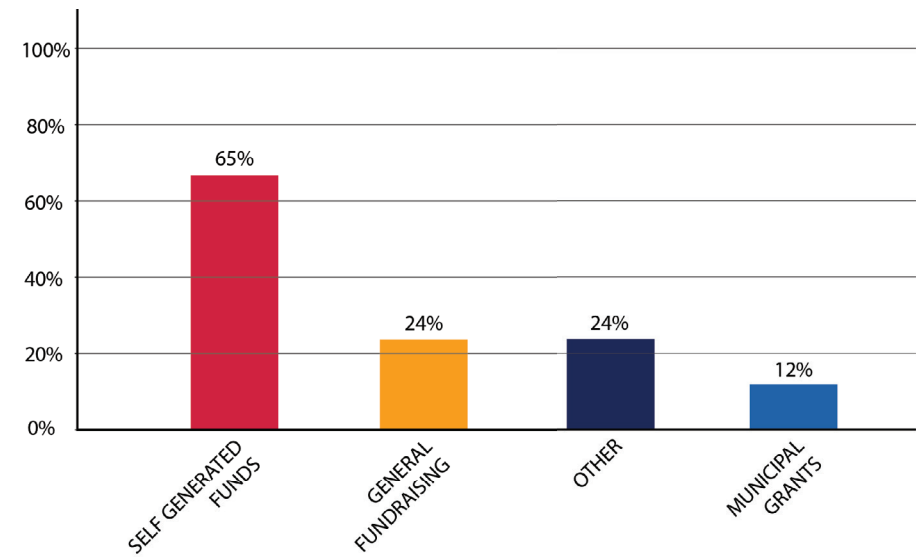
These numbers show the projected amount and frequency of uses that respondents predict they would use various facilities in a new Active Living Recreation Centre. If these numbers are used to forecast anticipated use the three activities that would see the most use, respectively, are: fitness/wellness space, indoor track and arena.

2. STAKEHOLDER SURVEY RESULTS

TYPE OF SERVICES CURRENTLY OFFERED - EXISTING REGIONAL FACILITIES



PRIMARY SOURCE OF CAPITAL FUNDING SOURCES FOR USER GROUPS:



3. COMMUNITY SURVEY SUMMARY

M.D. of Foothills - Arena Needs Assessment

Summary of Findings Report

The online survey was held for 40 days (5 ½ weeks) from the 23rd of March to the 31st of May, 2015.

In that time 456 respondents completed the survey.

Of the 456 respondents:

- 412 are residents of the M.D. of Foothills (92.4%)
- 211 are aged 36 – 55 (47%);
 - o 15 are aged 18 – 25 (4%);
 - o 42 are 26 – 35 (10%);
 - o 106 are aged 56 – 65 (24%); and
 - o 70 are aged 65 + (16%)
- 264 residents live closest to Millarville (59.2%)
 - o 115 to Priddis (26%)
 - o 31 to Red Deer Lake (7%)
 - o 14 to Other (4.4%)
 - o 17 to De Winton (4%)
- 397 residents are in support of the Active Living Recreation Centre (90.2%)
 - o 44 are opposed (9.98%)
- 372 residents would like to see a fitness / wellness space (87.1%)
 - o 336 would like to see an indoor walking / running track (79%)
 - o 318 would like to see an arena – ice / dryland trailing facility (75%)
 - o 294 would like to see multipurpose rooms (69%)
 - o 153 would like to see a senior's club (50%)
 - o 174 would like to see a community library (41%)
 - o 126 would like to see a local museum (30%)
 - o 136 wanted other facilities not listed (32%):
 - 45/136 wanted swimming or aquatic facilities
 - 18/136 wanted more indoor gym facilities including basketball courts, indoor soccer, yoga, squash courts and fitness classes

- *6/136 wanted daycare, afterschool childcare programs*
 - *5/90 wanted an indoor climbing wall*
- 378 residents would use the fitness / wellness centre
 - *336 would use the indoor walking / running track*
 - *218 would use the arena – ice / dryland training facility*
 - *258 would use the multipurpose rooms*
 - *222 would use the community library*
 - *181 would use the senior's club*
 - *168 would use the local museum*

Most of the respondents are local to the M.D. of Foothills who felt the active living recreation centre to be a positive addition to the community. Although there were a number of additional ideas about the facilities that should be provided, the majority were in favor of a fitness / wellness space. The other most favorable facilities included an indoor walking / running track and an arena – ice / dryland training facility.

A significant portion of the comments indicated support for facilities closer to home to reduce the need to travel to more urban centers.