

Final Report

**Arena Needs Study
2011-2026**

City of Oshawa

**Prepared by:
The RETHINK GROUP**

October, 2011



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Summary

The purpose of this study is to examine the current and future requirement for indoor ice in the City of Oshawa, and to determine the impact of current and projected future demand on the inventory of arena facilities that are available for community use.

The study examined registration and trends for the principle users of Oshawa arenas over the past fifteen years, and predicts likely future demand. Also examined were overall utilization and the unique use pattern of each ice surface over the past five winter seasons, with a focus on prime time use and the 2010/11 season.

Supply of Ice Surfaces

In recent years, the supply of indoor ice surfaces has stabilized in the City. With the opening of the twin-pad Campus Ice Centre and the four-pad Legends Centre in 2005, and the two ice surfaces at the General Motors Centre (GMC) in 2006, and the closure of the single pad North Oshawa Arena in 2004 and the single pad Civic Auditorium at the end of October, 2006, the result is 12 publicly-available indoor ice surfaces. However, based on availability for *community* use, the Campus Ice Centre is considered to be equivalent to 1.5 ice surfaces, and the GMC is determined equivalent to one ice surface – totalling 10.5 publicly-available ice surfaces.

Within the six immediately neighbouring communities, there are 30 additional public indoor ice surfaces. The service level varies considerably with Ajax, Pickering and Clarington having the lowest ratios of ice surfaces to total population, as well as for the principle customer group (age 5-19). The comparable service level for the City of Oshawa (based on an estimated 2011 population of 151,500) is 1 ice surface:14,429 and 1 ice surface:2,668 5-19 year olds (in 2006). Within the larger communities, Oshawa has the second best service level, next to Whitby.

<input type="checkbox"/> Whitby (10)	1 ice surface:12,500 population (1ice surface:2,589 5-19 year olds in 2006)
<input type="checkbox"/> Clarington (5)	1 ice surface:17,600 population (1ice surface:3,731 5-19 year olds in 2006)
<input type="checkbox"/> Ajax (5)	1 ice surface:22,300 population (1ice surface:4,413 5-19 year olds in 2006)
<input type="checkbox"/> Pickering (5)	1 ice surface:22,000 population (1ice surface:4,049 5-19 year olds in 2006)
<input type="checkbox"/> Uxbridge (2)	1 ice surface:10,500 population (1ice surface:2,214 5-19 year olds in 2006)
<input type="checkbox"/> Scugog (3)	1 ice surface:7,500 population (1ice surface:1,470 5-19 year olds in 2006)

Over the past six years, no new ice surfaces have been constructed within the study area. Although there are no firm plans to add to the current inventory, it is expected that neighbouring communities will increase their supply of arenas in the near to mid-range future.

Utilization of Ice Surfaces

Since the requirement for arenas is driven by use in the principle season and the most popular times of the week, the analysis focused on the 26-30 week *regular* winter season and prime time.

Based on the *official* definition of prime time, the average hours per week during the 2010/11 season was 60.5, which is at the low end of typical. However, due to reduced hours of operation particularly on weekends, city-owned facilities are not open in the early and later hours that are officially defined by prime time, thus reducing the number of prime time hours to an average of

54.4 per week. *That figure is well below the norm for communities within the study area and for other medium-size communities and does not represent effective utilization of arenas.* It is not the norm to open on weekends at 8:00 am or 9:00 am and close by between 8:00 pm and 10:30 pm. Only five hours on the weekend are allocated to community use or sold by the City to other groups at Pad #2 of the GMC. This is one indication of surplus supply in Oshawa.

For the 2010/11 season, utilization of the *actual* prime time that was available ranged from a low of 57.3% at Pad #2 at the GMC to a high of 100% at Pad #1 at the Campus Ice Centre. The highest utilization of a city-owned facility was the Donevan Arena at 95.4% and the lowest was at Children's Arena at 82.3%. Combined utilization at all publicly-available ice surfaces in 2010/11 was 87.1%, including ice sold to outside groups and City programs. Combined utilization of the eight city-owned arenas was 87.6%.

When the higher figure of 60.5 hours of *potential* prime time per ice surface per week is considered, utilization figures are much lower. If hours of operation could be increased to match *official* prime time, the highest utilization would remain Pad #1 at the Campus Ice Centre (89.8%) and the lowest would be Pad #2 at the GMC (47.4%). At the city-owned facilities, the ice surface with the highest utilization based on this expanded definition of prime time hours was Pad #1 at the Legends Centre (87.6%), while the lowest utilization continued to be at Children's Arena (68.2%).

Note: Data available on actual hours of operation and ice time utilized is much better for the eight city-owned ice surfaces. The data used for the Campus Ice Centre and the GMC was based on actual permitted hours from the City's permitting software and is based on estimated hours for the 2010/11 season.

Although utilization in 2010/11 for the eight city-owned ice surfaces was 5.8% higher than in 2006/07, total permitted and sold prime time and utilization of available prime time peaked in the 2008/09 season at 92.7% and has declined over the past two seasons.

While registration with five of the affiliated user groups either declined or remained stable over the past five seasons, those groups increased their utilization of prime time. Most groups took more than their entitlement of ice time to support expanded programs in skill development, and increased practice and game time. This is another indication of surplus supply.

With excess prime ice time available since 2006, affiliated groups have also been able to be selective about the hours they choose. For the 2010/11 season, that resulted in the following pattern of unused and available prime time ice:

- Some weekday prime time hours were available:** Children's and Harman Park South arenas, the Legends Centre, Campus Ice Centre #2 and GMC (both pads).
- Prime weekday evening hours were available for City programming and rentals at** Legends #2, Children's, Donevan and Harman Park North arenas.
- Numerous weekend prime time hours were available:** typically one or two early and late hours, but also early evening, mid morning, and part or all of afternoon blocks - mostly at the Legends Centre, Harman Park North Arena, Children's Arena, Campus Ice Centre #2, and GMC #2 (only 5 hours/weekend were allocated at GMC #2).

- ❑ **Blocks of weekend time were available for City programming and rentals**, mostly at Legends #2, but also at Harman Park North Arena, Legends Centre #1 and #3, and GMC #2.

Principle Users of Prime Ice Time

For the 2010/11 regular winter season, the top customer for prime time ice in city-owned arenas was the Oshawa Minor Hockey Association. Use by all affiliated groups is noted below, along with a comparison to the amount of prime ice time utilized in the 2006/07 season, indicating either an upward or downward five-year trend in ice time utilization for each group. Note that the Oshawa Skating Club has only been taking prime time ice in city-owned arenas since the 2008/09 season. They principally use Pad #2 at the Campus Ice Centre.

- ❑ Oshawa Minor Hockey Association (OMHA) 2,833.5 hours (-19.2%)
- ❑ Oshawa Girls Hockey Association (OGHA) 1,638.25 hours (+29.8%)
- ❑ NASC Hockey 1,380.5 hours (+9.9%)
- ❑ Oshawa Church Hockey League (OCHL) 1,375.0 hours (-2.9%)
- ❑ CYO Hockey Association (CYO) 633.5 hours (+4.5%)
- ❑ Oshawa Ringette Association (OSR) 547.0 hours (+19.2%)
- ❑ Oshawa Skating Club (OSC) 145.0 hours

Because the City does not actually permit or schedule community use at the **GMC and the Campus Ice Centre**, *accurate* and *comparable* information about how much ice time is used by any particular group over the season or other uses at those facilities is not available. However, based on the weekly schedule or matrix, the principle users of those facilities in 2010/11 were: OMHA (36.5 hours/week), OCHL (22 hours/week), OGHA (17 hours/week), OSC (16 hours/week), OLHA (8 hours/week), adult hockey league (7.5 hours/week), DSSC (4 hours/week), and OSR (1.75 hours/week).

Unallocated Prime Time

Unallocated prime ice time represents hours that are available after negotiating with affiliated groups (as defined in the Ice Allocation Policy), based on their entitlement numbers and any extra time they request. The number of unallocated prime time hours has varied over the past seven seasons as noted below and has trended generally upward, especially in the last three years. The numbers include hours identified as by groups after the season begins. The numbers do NOT include the hours defined as prime time that are not available due to reduced hours of operation at city-owned facilities (50 hours/week or the 1,390 for the 2010/11 season).

- ❑ 2005/06 46
- ❑ 2006/07 73
- ❑ 2007/08 64
- ❑ 2008/09 57
- ❑ 2009/10 80
- ❑ 2010/11 84
- ❑ 2011/12 81

For the 2010/11 regular winter season, the most unallocated prime time ice was at the Pad #2 at GMC (22 hours/week), Pad #3 at the Legends Centre (14 hours/week), Pad #2 at the Legends Centre (11 hours/week), Pad #4 at the Legends Centre (9 hours/week), Harman Park North Arena (8 hours/week), and Pad #1 at the Legends Centre (7 hours/week). 5.5 hours/week were available at Children’s Arena, and 3 hours were available at Harman Park South Arena. Donevan Arena had no unallocated prime time hours. All of the above figures do not account for

prime time hours at city-owned facilities that were not available due to shortened hours of operation.

For the 2010/11 regular winter season, a total of 1,699 unallocated prime time hours were available at city-owned facilities and approximately 885 unallocated hours at the Campus Ice Centre and the GMC (29.5 hours/week, based on the weekly schedule or matrix x 30 weeks).

Only 416 of the 1,699 unallocated hours at the city-owned arenas were sold (24.5%). Oshawa residents rented 52 hours and 364 hours were rented to non-residents. Most of non-resident customers were from Clarington (61.7% of the hours), Whitby (14%) and Ajax (12.2%).

As the amount of unallocated prime time has increased, the City implemented the following initiatives to help mitigate the impact on operational costs:

- Shortened the operational day at all facilities (early and late times that were not being used).
- Increased the amount of City programming,
- Allowed affiliated groups to purchase additional prime and non-prime time hours/week beyond their entitlement, and
- Advertised the availability of excess prime and non-prime time to unaffiliated customers.

For the 2010/11 winter season, 37 prime time hours/week were allocated to City programming that was regularly scheduled at the Donevan Arena and at Pads #1 and #2 at the Legends Centre. In addition, 14 prime time hours/week were scheduled for leisure skating.

Recent and Current Demand

Over the past fifteen years, demand for ice-sports by male groups has been in gradual decline across much of Ontario and in Oshawa. For some male groups in Oshawa, registration peaked between 2002 and 2005, although slight increases for some groups have been recorded heading into the 2011/12 season, especially from the youngest age group. Registration by older youth is declining as the big Echo generation ages out of their minor sports years. For all male Oshawa groups, registration in 2010 was below that of 1996. However, over the past five years, combined registration among OMHA, NASC, OCHL and CYO has been steady in the 2,425 to 2,511 range, with the lowest number in 2009.

There is unique competition for the declining number of child and youth skaters among the three principle hockey groups in Oshawa (OMHA, NASC and OCHL) and CYO which operates in Oshawa and Whitby. If the three Oshawa groups combined into one minor hockey organization, there would be less confusion for the customer, improved co-ordination and organizational efficiency and less strain on volunteer organizers. There would also be increased efficiency in ice time allocation, and less ice time would be required overall. As in most communities, the house league component could focus on the weekends and rep hockey on weekday evenings, which would make it easier on parents, most of whom have better access to weekends than weekday evenings. Increased appeal for and utilization of weekend ice time would be a significant benefit.

Although the numbers are smaller, participation across Canada in girls and women's hockey has generally trended upward over the past fifteen years. However, in Oshawa, registration in girls hockey peaked in 2008, and participation in Ringette and figure skating are both below the levels of the mid 1990s. Current (2010/11) registration in all female ice sports is 978, and has declined each year since the peak in 2007.

Future Demand

The key sources of information to help predict future demand for arenas are the following:

- anticipated growth in the population within the City and the surrounding area, especially the age groups that are the principle winter customers of arenas;
- anticipated changes in the age profile of the Oshawa community;
- local, provincial and national trends in participation in ice-related leisure activities;
- expansion and improvement of arenas by neighbouring municipalities;
- the impact on ice sports of increasing interest in indoor soccer and other indoor field sports;
- the growing market for tournaments; and
- the changing ethno-cultural composition of the Oshawa area.

Population growth for Oshawa is expected to be in the range of 1-1.4% per year over the next twenty years. However, the aging of the big Echo and Baby Boom generations will result in slow or no growth for the principle age groups that utilize Oshawa arenas, with declining population numbers projected for youth (age 15-19). The 0-19 age group has been declining in size in Oshawa since 2001 and is not expected to increase in size until after 2021, as the youngest segment of this age group begins to increase in size by that time. During that period, the young and middle age adult population (age 20-54) is projected to increase by around 6,000, assuming an average annual growth rate for the City of 1.4%. If the growth rate is less, growth in the younger age groups will be slower.

This anticipated slow growth of the principle market that uses arenas, coupled with the increasing influence of foreign-born residents with typically lower than average interest in ice sports, and anticipated competing demand from indoor soccer and other field sports in winter suggests that *demand from Oshawa residents for arenas is not expected to grow very much over the next fifteen to twenty years*. Most of the recent demand for child and youth hockey has been influenced by the big Echo generation, which has now pretty well aged out of their minor sports years. The 5-19 age group that is following the Echo generation is much smaller in size.

Consultation with user groups provided varied opinion about growth in each of their sports in the immediate future. While most were optimistic about some growth in the next year or so, only NASC Hockey predicted significant growth which can only be achieved by drawing from other child and youth hockey organizations in Oshawa and/or by attracting a larger share of the declining age segment that they all serve.

If the principle user groups can increase their market share, demand could increase at a rate that is greater than the rate of population growth for their respective market groups. However, that has only happened for girls and women's hockey.

Over the past five years, the number of hours of prime time allocated to tournaments has been increasing, influenced by the improved supply of arenas in Oshawa and the clustering of ice surfaces at the Legends Centre, Campus Ice Centre and General Motors Centre. This trend in tournaments is influenced by demand and can be controlled by the facility supplier. The City of Oshawa, with input from its users and through the Ice Allocation Policy, has decided to limit the number of tournaments in its facilities and the number of prime time hours allocated to this use in order to minimize the negative impact on its seasonal customers.

Interest in leisure skating is expected to increase, influenced mostly by the aging Baby Boom generation.

Although it is not the responsibility of the City of Oshawa to provide ice time for non-residents, demand for ice time from growing communities within the Region will increase unless those municipalities add significantly to their supply of arenas. As noted above, the need to ‘fill out’ the rosters of some affiliated user groups (e.g., CYO, OGHA, OLHA, OSC, Ringette and speed skating) requires notable non-resident registrants to sustain these groups.

Many Unknowns in Predicting Future Demand - Current and anticipated trends in registration/participation for any sport are influenced by such things as:

- an increase or decrease in the size of the potential market from which to draw participants,
- increasing or decreasing interest in a sport,
- the quality of the operation and leadership of a program or league,
- the impact of marketing for a program or sport,
- the quality and availability of facilities,
- competing activities within the same population group, and
- the economy in general, and the ability of individuals and families to afford to participate.

Factors such as the economy, the leadership of a group and the availability of adequate facilities can change relatively quickly. That is why it is difficult to predict demand for leisure activities with complete certainty. That is also why predictable change in the age profile of the population has proven to be the most useful indicator of the potential for broad, long-term shifts in the demand for specific leisure activities.

When available, the 2011 census data should be carefully studied and the age-specific population projections should be updated, based in part on that new benchmark. *If the new projections are significantly different from those prepared in 2004, adjustments in demand projections will have to be made.*

Required Ice Surfaces to Meet Current Demand

There is currently a surplus of between 1.6 and 2.2 publicly-available ice surfaces in the City of Oshawa, depending on the definition of prime time and the corresponding level of service provided. As described in detail in Section 2, this determination has been based on:

- the hours of operation at all publicly-available ice surfaces during the 2010/11 regular winter season,
- the hours of prime time available at all publicly-available ice surfaces during the 2010/11 regular winter season,

- ❑ the hours of *officially* defined prime time that were not available, particularly at city-owned ice surfaces due to reduced hours of operation during the 2010/11 regular winter season,
- ❑ the 2010/11 allocation of prime time to affiliated groups,
- ❑ requests from affiliated groups for additional prime time hours,
- ❑ prime time hours returned from affiliated groups after the beginning of the season,
- ❑ the 2010/11 level of City programming and rentals during prime time, and
- ❑ a target of 95% utilization of prime time.

Indicators of Surplus Prime Time

Since 2006, when the expansion of arenas was completed, there has been excess prime ice time.

- ❑ Affiliated groups have been able to receive all of their entitlement, based on the allocation formula and have been able to take additional hours if desired to expand their programs – for skill development, and to extend practice time and games. For the 2010/11 season, five groups took 66.5 hours/week of additional time, mostly prime time.
- ❑ Affiliated groups have been able to be quite selective about the prime time hours that they choose, leaving blocks of relatively attractive prime time available for groups like CYO to expand their entitlement. This has also allowed the City to schedule programming at times that would not be available in most communities (e.g., prime time weekday evenings and on weekends at Children’s, Donevan and Harman Park North arenas, as well as at the Legends Centre and GMC). For the 2010/11 season, 77 hours/week were allocated to leisure skating, and 40 hours/week to other City programs and rentals.
- ❑ The number of unallocated prime time hours per week and season has been increasing since 2006 and for the 2010/11 season totalled approximately 2,584 hours.
- ❑ Arenas are operating on a schedule of reduced hours in non-prime time at Children’s and Harman Park arenas, and during prime time at all city-owned facilities, due to insufficient demand. For the 2010/11 regular winter season, 50 prime time hours/week (1,380 hours/season) were not made available due to reduced hours of operation.

As introduced earlier, unallocated prime ice time across all ice surfaces for the 26-30 week 2010/11 regular winter season totalled:

- ❑ 1,699 unallocated prime time hours at the eight city-owned ice surfaces
- ❑ 885 (approximately) unallocated prime time hours at the CIC and GMC
- ❑ 2,584 total unallocated prime time hours (approximately)

The unallocated hours were divided by 1,560 (the average number of prime time hours per week available per ice surface in Oshawa during the 2010/11 season or 54.4 hours/week x 30 weeks for eight ice surfaces and 26 hours/week for four ice surfaces). That equals the prime time available in **1.66 ice surfaces**, based on reduced hours of operation.

If the 50 additional hours/week (1,380 hours/season) of prime time that was unavailable due to reduced hours of operation at the city-owned facilities is factored in, the total hours of unallocated prime time would have been 3,964 for the 2010/11 season. Based on an average of 60.5 prime time hours per week x 30 weeks for eight ice surfaces and 26 weeks for four ice surfaces (1,734 hours/week), those unallocated prime time hours would equate to the prime time available in **2.29 ice surfaces**. *The figure of 60.5 is the average hours of prime time per week*

that would be available at each ice surface if arenas were open for all of the 'officially' defined prime time. See pages 17-19 for details.

95% Utilization Target

However, the 1.66 and 2.29 figures slightly overstate the surplus, since the objective should not be to utilize 100% of all available prime time. That does not allow for any flexibility in scheduling and ensures that most groups will have to take some or a good deal of less than desirable hours. In 2010/11, the eight city-owned ice surfaces operated at 87.6% of capacity in prime time, based 12,471 recorded hours of available prime time and 10,921 hours of use. When all ice surfaces are considered, the capacity figure for that season was 87.1%. At a 95% utilization target, the surplus would be reduced to **1.58 ice surfaces**. If city-owned arenas were open for all of the *officially* defined prime time hours and 95% utilization was the target, the surplus would be **2.2 ice surfaces**.

Therefore, depending on the definition of prime time (or level of service provided) and factoring in a utilization target of 95%, there are currently between 1.6 and 2.2 surplus ice surfaces in the City of Oshawa to meet *current* needs.

Required Ice Surfaces to Meet Future Demand

The analysis of potential future demand (see Section 3) concluded that the likelihood of much growth in demand for arenas over the next ten to fifteen years is low, unless unforeseen circumstances accelerate growth in demand beyond what is anticipated. Growth in demand will likely increase a little from adults, but demand from children and especially youth should continue to decline. The larger number of adults may not compensate for the declining number of younger participants who utilize more hours of ice time per person than adults. Growth in demand is expected to begin with younger participants by around 2021.

However, some allowance should be provided for the potential for future growth in demand.

Allowing for 5% growth in demand for prime ice time, between 8.7 and 9.4 ice surfaces would be required, depending on how prime time is defined. Based on the current supply of the equivalent of 10.5 publicly-available ice surfaces, that would equate to a surplus of between 1.1 and 1.8 ice surfaces.

Allowing for 10% growth in demand for prime ice time, between 9.1 and 9.8 ice surfaces would be required, depending on how prime time is defined. Based on current supply of the equivalent of 10.5 publicly-available ice surfaces, that would equate to a surplus of between 0.7 and 1.4 ice surfaces.

Therefore, based on a utilization target of 95% and a rate of growth in demand for prime ice time of between 5% and 10%, there would be a surplus of between 0.7 and 1.8 ice surfaces to meet *future* needs, depending on the definition of prime time or level of service provided.

Agreement for Community Access to the Campus Ice Centre

In looking to the future, it must be kept in mind that the current agreement for community access to the Campus Ice Centre expires in 2025. There is no guarantee that the current agreement for access to the equivalent of 1.5 ice surfaces in prime time will continue at that time. If more prime time is required for varsity sports, less time will be made available for community use.

The following are two broad strategies and implications for reducing the supply of ice surfaces in Oshawa in the near future.

Scenario One: Reduce the Supply by One Ice Surface

Scenario One proposes that one ice surface be removed from the inventory in the immediate future.

Given the amount of excess prime time, the impact on **current use** would be manageable. The prime time currently allocated to one ice surface can easily be replaced by:

- Utilizing unallocated prime ice time at other facilities.
- Expanding the hours of operation on weekends at some facilities, if necessary.
- Reducing some of the prime time allocated to City programming (e.g., leisure skate).
- Reducing some of the adult rentals in prime time (e.g., shinny hockey).
- Reducing the number of prime time hours sold to unaffiliated Oshawa customers and out-of-town clients.

Affiliated groups would be able to receive all of their entitled hours and any additional hours that they desire, although some of the hours would be at less than desirable times. After adjustments, some surplus hours will remain, depending on how much additional prime time is made available by increasing hours of operation, and how many extra hours are sold to affiliated groups and how many hours are sold to other clients. It would be the intention to first utilize the ice time at the eight ice pads operated by the City, which will allow the City to maintain most of the ice rental revenues. The majority of tournament replacement ice would continue to be found at GMC.

A supply of the equivalent of 9.5 publicly-available ice surfaces (one less than is currently available) would accommodate **growth in demand** of up to around 5%, but scheduling flexibility would be further reduced and more undesirable hours would have to be taken. However, if growth in demand reaches 10%, there could be a shortage if one ice surface is removed, since the equivalent of between 9.1 and 9.8 publicly-available ice surfaces would be required, depending on how prime time is defined and the corresponding level of service.

Scenario Two: Reduce the Supply by Two Ice Surfaces

Scenario Two proposes that two ice surfaces be removed from the inventory in the immediate future.

Reducing the supply of two surfaces will have the following impacts:

- A significant adjustment will be required to the scheduling for ice organizations via the allocation policy, including affiliated users being required to take what is currently considered to be 'unpopular' hours.
- There will be almost no capacity to replace hours due to tournaments and other uses, and unforeseen situations - since ice scheduling will become very tight.

- ❑ There will be some corresponding revenue loss from displaced ice and floor rentals and programs.
- ❑ There will be little to no capacity to accommodate future growth in demand from Oshawa groups, depending on the amount of growth.

See Section 4 for a strategy to replace the lost prime time.

1.0 Introduction

The purpose of this study is to examine the current and future requirement for indoor ice in the City of Oshawa, and to determine the impact of current and projected future demand on the inventory of arena facilities that are available for community use.

A similar study was completed in 2006, as user groups and the City were getting accustomed to the increased inventory of ice surfaces.

Over the past five winter seasons from 2006/07 to 2010/11, affiliated groups and other users, as well programs offered by the City have been able to expand (if required) and have been able to take advantage of better ice times, due to the availability of excess hours of prime time during the 'regular' winter season.

Even with expanded allocation to most groups and the application of marketing campaigns to sell excess prime ice time to unaffiliated Oshawa and out-of-town groups, considerable prime time remains unutilized at most ice surfaces.

This study examines registration and trends for the principle users of Oshawa arenas over the past fifteen years (with a focus on the past five years), and predicts likely future demand. Overall utilization and the unique use pattern of each ice surface are examined over the past five regular winter seasons, with a focus on prime time use and the 2010/11 season.

Sources of Information

The following sources provided much of the information incorporated into this study. The principle source was Recreation and Culture Services, City of Oshawa. Other sources included:

- Oshawa Planning Services
- Region of Durham
- Neighbouring municipalities
- Statistics Canada
- Hockey Canada
- Skate Canada
- Ringette Canada
- US Figure Skating
- consultant files

2.0 Supply and Utilization

2.1 Introduction

This section describes the supply and utilization of publicly-available indoor ice surfaces in the Oshawa and nearby communities, as well as an analysis and comparison of service levels.

The focus of the analysis of utilization is on the 30 week ‘regular’ winter season (September to March), since the requirement for ice surfaces is determined by the most intensely utilized portion of the year. Although some analysis will be completed on utilization of non-prime ice time, the focus will be on prime time, since the requirement for ice surfaces is mostly based on the degree of utilization of the most popular time.

Although ice remains in some ice surfaces during the summer and the floors of other ice surfaces are used for lacrosse, ball hockey and other sports and activities, summer use was not examined in any detail. The requirement for ice surfaces is driven by the demand for prime time, ‘regular’ winter season ice.

Data is presented on the principle users, trends in registration and ice time utilization by group and ice surface, and trends in the amount of unallocated prime ice time per season.

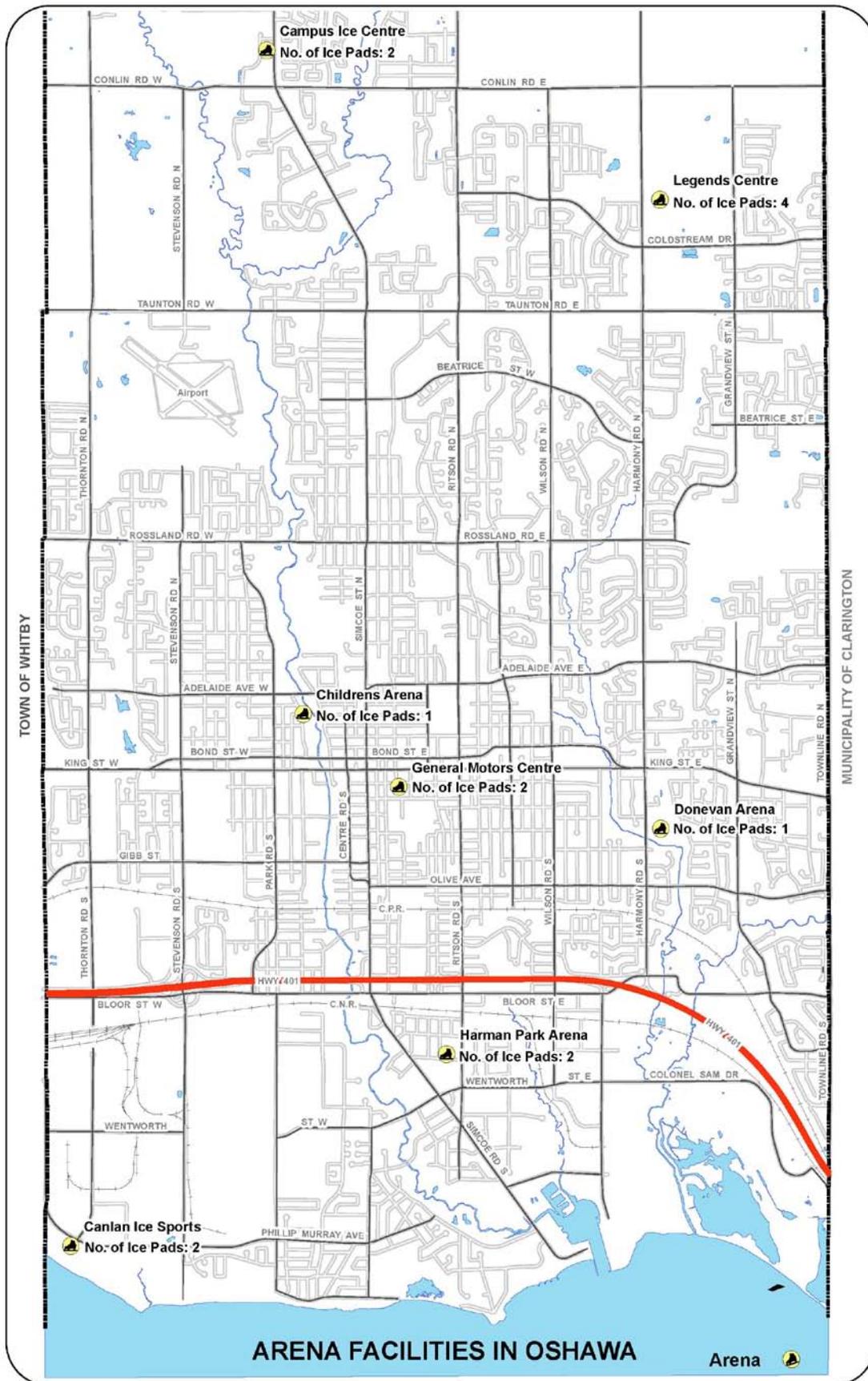
2.2 Current Supply

In recent years, the supply of indoor ice surfaces has stabilized in the City. With the opening of the twin-pad Campus Ice Centre and the four-pad Legends Centre in 2005, and the two ice surfaces at the General Motors Centre (GMC) in 2006, and the closure of the single pad North Oshawa Arena in 2004 and the single pad Civic Auditorium at the end of October, 2006, the result is 12 publicly-available indoor ice surfaces (see specifics below). However, based on availability for *community* use, the Campus Ice Centre is considered to be equivalent to 1.5 ice surfaces, and the GMC is determined to be equivalent to one ice surface – totalling 10.5 publicly-available ice surfaces.

- Children’s Arena (built in 1956, 1 ice pad)
- Harman Park Arena (built in 1968, 2 ice pads)
- Donevan Recreation Complex (built in 1975, 1 ice pad)
- Campus Ice Centre (opened in 2005, 2 ice pads; equivalent of 1.5 ice surfaces available to the community under a twenty-year ‘shared use’ agreement with the City of Oshawa)
- Legends Centre (opened in 2005, 4 ice pads)
- General Motors Centre (opened in 2006, 2 ice pads; equivalent of 1 ice surface available to the community)

Two ice surfaces are also available at the commercial Canlan Ice Sports facility in southwest Oshawa.

Refer to the following map of arenas in Oshawa. See page 16.



Arena Needs Study, City of Oshawa, 2011-2026

The RETHINK GROUP, Leisure Services Planning and Management

Arenas in Neighbouring Communities, Service Levels and Plans for Expansion of Supply

Within the six immediately neighbouring communities, there are 30 additional public indoor ice surfaces, as noted below:

<input type="checkbox"/> Whitby (10)	1 ice surface:12,500 population (1ice surface:2,589 5-19 year olds in 2006)
<input type="checkbox"/> Clarington (5)	1 ice surface:17,600 population (1ice surface:3,731 5-19 year olds in 2006)
<input type="checkbox"/> Ajax (5)	1 ice surface:22,300 population (1ice surface:4,413 5-19 year olds in 2006)
<input type="checkbox"/> Pickering (5)	1 ice surface:22,000 population (1ice surface:4,049 5-19 year olds in 2006)
<input type="checkbox"/> Uxbridge (2)	1 ice surface:10,500 population (1ice surface:2,214 5-19 year olds in 2006)
<input type="checkbox"/> Scugog (3)	1 ice surface:7,500 population (1ice surface:1,470 5-19 year olds in 2006)

Based on Amendment 128 of the Durham Region Official Plan (June, 2009), the 2011 population of Durham Region is estimated to be 631,520 (not including Brock Township, which is outside of the study area). Utilizing that population figure, the current provision of indoor ice surfaces would equate to an average of one ice surface per 15,593 residents (assuming the equivalent of 10.5 publicly available ice surfaces for the City of Oshawa and the 30 other ice surfaces located within the other communities as noted above). The City of Oshawa Department of Planning and Development Services estimates the current population to be approximately 151,500. That would produce a ratio of one ice surface per 14,429 residents. Both figures represent a slightly higher service level for Oshawa than the regional average (not accounting for Brock Township).

As noted above, the service provision ratios for Pickering, Ajax and Clarington are well below those of the Region of Durham, Whitby, Uxbridge, Scugog and Oshawa. With much higher percentages of children and youth in the Pickering, Ajax, Whitby, Clarington and Uxbridge, compared to Oshawa and Scugog, the ratio of ice surfaces to children and youth illustrate even lower provision levels in all but Whitby, Uxbridge and Scugog which each have a higher service level than Oshawa's 1 ice surface:2,668 age 5-19 year olds (based on 2006 census populations).

The only community in the study area to report any firm plans for arena expansion is the Town of Ajax. They are anticipating a Phase II of the new Audley Recreation Complex around 2016, but have not committed to the facility components. The first phase did not include ice surfaces. It is expected that arena supply will increase within the study area in the next 20 years.

2.3 Utilization

The analysis will focus on the 26-30 week 'regular' winter season (September-March) and on utilization of prime time. There is also the spring/summer period (April-August) and the Tryout Period (April-May). However, as noted above, determination of the need for ice surfaces is driven by prime time and use in the prime season.

Official Prime Time

Figure 1 defines prime time at each ice surface for the 2010/11 regular winter season. Prime time hours/week totalled 726 (310 hours on Monday to Friday and 416 hours on weekends). Adjusted to the prime time hours available for community use at the Campus Ice Centre and the GMC, the total is reduced to 599 hours (253 hours on weekday evenings and 346 hours on

weekends). The regular winter season was 30 weeks at the Legends Centre, Campus Ice Centre and General Motors Centre, while at the Children's, Donevan and Harman Park arenas, the season varies between 26 and 27 weeks.

Actual Prime Time Capacity

However, fewer prime time hours are actually made available for use than are *officially* defined as prime time. Since 2006 when the inventory of ice surfaces reached the current level, *none of the city-owned facilities has been open for all of the hours that are defined as prime time, especially on weekends.* Agreements defining community use times would have to be amended to allow increased access to the Campus Ice Centre and GMC. Therefore, those potential hours have not been factored into the hours per typical week and winter season that could be made available. However, as noted in Figure 2, prime time hours outside of those agreements are made available for community allocation (55.5 hours/week). For the 2010/11 winter season, the potential actual prime time hours available for community use at all publicly-available ice surfaces totalled 604.5/week or 17,275 hours over the season. Some adjustments were made during the season. This number is slightly different from the total in Figure 1 due to adjustments made to accommodate the varsity program at Pad #1 in the CIC.

**Prime Time Capacity in the Regular Winter Season,
Publicly-Available Ice Surfaces, City of Oshawa, 2010/11**

Figure 1

Ice Surface	Monday-Friday		Weekends		Total Hours/Wk	Actual Hrs Avail. for the 2010/11 Season
	Prime Time	Hours (actual)	Prime Time	Hrs. (actual)		
Legends Pad #1	4:30 pm-10:30 pm	30	6:30 am-12:30 pm	36 (32)	66 (62)	1,797
Legends Pad #2	5:00 pm-10 pm	25	6:00 am-12:00 am	36 (30)	61 (55)	1,651
Legends Pad #3	5:15 pm-10:15 pm	25	6:15 am-12:15 am	36 (32)	61 (57)	1,644
Legends Pad #4	5:15 pm-10:15 pm	25	6:15 am-12:15 am	36 (30)	61 (55)	1,656
Donevan	5:00 pm-10 pm	25	6:00 am-12:00 am	36 (28)	61 (53)	1,412
Children's	5:00 pm-10 pm	25	6:00 am-12:00 am	36 (28)	61 (53)	1,415
Harman Pk. N. Pad	5:00 pm-10 pm	25	7:00 am-12:00 am	34 (26)	59 (51)	1,412
Harman Pk. S. Pad	4:30 pm-10:30 pm	30	7:30 am-12:30 am	34 (28)	64 (58)	1,484
Sub-total		210		284 (234)	494 (444)	12,471
Campus Ice Pad #1	5:00 pm-10 pm	25	6:00 am-11:00 pm	34 (28)	59 (53)	1,590
Campus Ice Pad #2	5:15 pm-10:15 pm	25	6:15 am-11:15 pm	34 (29)	59 (54)	1,620
GMC Pad #1	5:00 pm-10 pm	25 (11.5)	6:00 am-10:00 pm	32 (0)	57 (11.5)	345
GMC Pad #2	5:15 pm-10:15 pm	25	6:15 am-10:15 pm	32 (22)	57 (47)	1410
Totals		310 (296.5)		416 (313)	726 (609.5)	17,436

Note: Community access to the Campus Ice Centre equates to 1.5 ice surfaces. Community access to General Motors Centre equates to 1 ice surface (resulting to the equivalent of 10.5 ice surfaces available for community use). The numbers in brackets represent the reduced prime time hours available, based on when facilities were actually open during the 2010/11 season.

Prime Time Hours/Week that Were Formally and Actually Made Available to the Community at the Campus Ice Centre and the GMC, 2010/11 Season

Figure 2

Facility	Monday-Friday	Weekends	Totals	Totals Based on 30 Week Season
Campus Ice Centre #1	23 (22)	25 (25)	48 (47)	1,440 (1,410)
Campus Ice Centre #2	25 (22)	29 (25)	54 (47)	1,620 (1,410)
GMC #1	8 (11.5)	0 (0)	8 (11.5)	240 (345)
GMC #2	25 (25)	22 (22)	47 (47)	1,410 (1,410)
Totals	81 (80.5)	76 (72)	157 (152.5)	4,710 (4,575)

Note: The numbers in brackets represent the actual hours made available to the community for allocation.

For the 2010/11 regular winter season, the *actual* available hours of **prime time** varied significantly across the ice surfaces as noted below (the numbers for CIC and GMC are estimates):

<input type="checkbox"/> Children's	1,415 hours	<input type="checkbox"/> Legends 3	1,644 hours
<input type="checkbox"/> Donovan	1,415 hours	<input type="checkbox"/> Legends 4	1,656 hours
<input type="checkbox"/> Harman Park North	1,412 hours	<input type="checkbox"/> Campus Ice Centre 1	1,590 hours
<input type="checkbox"/> Harman Park South	1,484 hours	<input type="checkbox"/> Campus Ice Centre 2	1,620 hours
<input type="checkbox"/> Legends 1	1,797 hours	<input type="checkbox"/> GMC 1	345 hours
<input type="checkbox"/> Legends 2	1,651 hours	<input type="checkbox"/> GMC 2	1,410 hours

For the 2010/11 regular winter season, the available hours of **non-prime time** also varied significantly among the ice surfaces as noted below:

<input type="checkbox"/> Children's	144 hours	<input type="checkbox"/> Legends 3	1,210.5 hours
<input type="checkbox"/> Donovan	1,074 hours	<input type="checkbox"/> Legends 4	1,222 hours
<input type="checkbox"/> Harman Park North	170 hours	<input type="checkbox"/> Campus Ice Centre 1	420 hours
<input type="checkbox"/> Harman Park South	37 hours	<input type="checkbox"/> Campus Ice Centre 2	120 hours
<input type="checkbox"/> Legends 1	1,058 hours	<input type="checkbox"/> GMC 1	90 hours
<input type="checkbox"/> Legends 2	1,213 hours	<input type="checkbox"/> GMC 2	225 hours

Average Hours of Prime Time per Week

For the 2010/11 regular winter season, the average hours of prime time/week, based on the *official* definition (see **Figure 1** above) was 60.5 hours. That is within the range of what is typical across the Region of Durham and in larger communities across Ontario - *although at the low end of that range*. In the other Durham Region communities, weekday prime time begins at 4:00 pm - 5:30 pm and extends until 10:45 pm -12:00 am. On weekends, prime time includes all hours of operation except for Whitby where prime time is defined as 6:00 am -12:00 pm.

However, as was introduced above, due to insufficient demand, facilities are not opened as early on weekends as defined by prime time and are closed earlier on weekend evenings. When the *actual* available prime time is considered, the average drops to 54.4 hours/week. Due to the very limited unavailability of the main ice pad at the GMC for community use, that facility was NOT factored into the above calculation of average *actual* prime time per week.

The 54.4 hours/week figure is well below the norm for medium-size communities, and does not represent effective utilization of arenas. It is not the norm to open on weekends at 8:00 am or 9:00 am and close by between 8:00 pm and 10:30 pm. Only five hours on the weekend are allocated to community use or sold by the City to other groups at GMC #2. This is one indication of surplus supply in Oshawa.

Ice Allocation Policy

The current Ice Allocation Policy was approved by City Council on July 18, 2005. In the policy, the City's goal is "*to promote and encourage participation in ice sports to the overall benefit of the community. This Ice Allocation Policy has been developed to address the changing demographics, market supply of indoor ice, distribution of ice in a fair and equitable manner, and the successful ongoing management of ice.*"

The policy states that ice will be allocated according to the following priority levels:

1. City of Oshawa programs (includes leisure skating and instructional programs)
2. Affiliated minor associations, organizations and groups
3. Affiliated adult associations, organizations and groups
4. Junior A – Oshawa Generals and Legionnaires (outside contract allocation of the GMC)
5. Boards of Education – LOSS, high school hockey and other school use
6. Occasional and commercial users

‘Affiliated’ status is granted to groups who can annually demonstrate stability and viability for priority ice time access. Priority 2 and 3 clients are also expected to fulfill additional responsibilities in order to receive additional benefits outlined in the Ice Allocation and Management Policy and Procedure document. Adult groups who permit two or less hours per week are not eligible for affiliated status and become a Priority 6 level client. However, the City provides grandfather status to long-term adult league clients - which provides these groups with Priority 3 level status and historical ice times (similar dates or time blocks) to all shinny and league users. Grandfather status is lost if a group disbands or fails to apply for ice in consecutive ice seasons.

In recognition of the tax-based contribution provided by its residents toward the development and operation of arenas, the Ice Allocation Policy recognizes that residents will always receive priority over non-residents in the allocation of ice time. For the purposes of supporting the ongoing development of ice user groups, the City will accept the residency requirements defined by the sport governing bodies that govern the actions of local affiliated groups. The City reserves the right to impose residency requirements or limitations on permit applicants at any time in the future when it is deemed necessary (e.g., restricted ice capacity). The City will accommodate the regular use of ice by non-residents after resident demand is satisfied and under special circumstances such as reciprocal agreements. Non-residents will not achieve historical status regarding permit allocation on a year-to-year basis.

Weekly hours that are allocated to an affiliated group or organization are based on justified need. A ‘Standards of Play’ formula determines the total number of weekly hours entitled to each group and the distribution of hours to different age and skill level groupings. All affiliated and grandfathered groups are required to commit to at least a 24 consecutive week schedule.

New programs or services and sponsoring organizations or associations will be accommodated only to provide for unmet community needs. Existing or new groups must demonstrate/justify the need for a new program or service while also meeting the other criteria outlined in the allocation policy.

When reasonable and feasible, the City will recognize a new ice organization or emerging ice sport and will allocate ice time to enable it to establish its programs and services. Recognition and ice allocation will occur once the conditions and criteria outlined in the allocation policy are met and if existing affiliated users will not be adversely affected. The City will use unallocated ice first to meet the needs of a new applicant, but reserves the right to reasonably reallocate hours from existing users, if warranted.

Principle Users of City-owned Arenas and Trends in Ice Time Utilization

Because the City does not actually permit community use at the GMC and the Campus Ice Centre, *accurate* and *comparable* information about how much ice time is used by any particular group or other uses at those facilities is not available. Therefore, the following detailed analysis of types of use is only for the eight City-owned ice surfaces.

For the 2010/11 regular winter season, the top customer for **prime time ice** in city-owned arenas was the Oshawa Minor Hockey Association. Use by all affiliated groups is noted below, along with a comparison to the amount of prime ice time utilized in the 2006/07 season, indicating either an upward or downward five-year trend in ice time utilization for each group. Note that the Oshawa Skating Club has only been taking prime time ice in city-owned arenas since the 2008/09 season. They principally use Pad #2 at the Campus Ice Centre.

<input type="checkbox"/> Oshawa Minor Hockey Association (OMHA)	2,833.5 hrs. (-19.2%)
<input type="checkbox"/> Oshawa Girls Hockey Association (OGHA)	1,638.25 hrs. (+29.8%)
<input type="checkbox"/> NASC Hockey	1,380.5 hrs. (+9.9%)
<input type="checkbox"/> Oshawa Church Hockey League (OCHL)	1,375.0 hrs. (-2.9%)
<input type="checkbox"/> CYO Hockey Association (CYO)	633.5 hrs. (+4.5%)
<input type="checkbox"/> Oshawa Ringette Association (OSR)	547.0 hrs. (+19.2%)
<input type="checkbox"/> Oshawa Skating Club (OSC)	145.0 hrs.

Over the past five seasons, only the OMHA and NASC have increased registration. *However, over the past five seasons all but the OMHA and OCHL have increased their utilization of prime time ice and the ratio of prime time hours per registrant (significantly for CYO, OGHA and Ringette).* See **Figure 3** below.

Based on the weekly schedule or matrix, the principle users of prime time at the CIC and GMC in 2001/11 were: OMHA (36.5 hours/week), OCHL (22 hours/week), OGHA (17 hours/week), OSC (16- hours/week), OLHA (8 hours/week), adult league hockey (7.5 hours/week), DSSC (4 hours/week), and OSR (1.75 hours/week).

For the 2010/11 regular winter season, the top customer for **non-prime time** ice in city-owned arenas was the OGHA. Use by all affiliated groups is noted below, along with a comparison to the amount of ice utilized in the 2006/07 season, indicating either an upward or downward five-year trend in ice time utilization for each group.

<input type="checkbox"/> Oshawa Girls Hockey Association (OGHA)	218.0 hrs. (+42.9%)
<input type="checkbox"/> Oshawa Church Hockey League (OCHL)	130.0 hrs. (+33.9%)
<input type="checkbox"/> NASC Hockey	108.0 hrs. (-8.3%)
<input type="checkbox"/> Oshawa Minor Hockey Association (OMHA)	107.0 hrs. (-116.1%)
<input type="checkbox"/> Oshawa Ringette Association (OSR)	87.0 hrs. (+83.9%)
<input type="checkbox"/> CYO Hockey Association (CYO)	7.0 hrs. (-742.9%)
<input type="checkbox"/> Oshawa Skating Club (OSC)	3.5 hrs.

Over the past five seasons, the OCHL, OGHA and Ringette have increased their allocation of non-prime time ice, even though registration has either declined or remained stable, which has resulted in an increased ratio of non-prime time hours per registrant for these groups. Note that

the Oshawa Skating Club has only been taking prime time ice in city-owned arenas since the 2010/11 season. See **Figure 3** below.

For the 2010/11 regular winter season, use of **prime time** at city-owned arenas by the four broad customer groups was as follows, along with utilization trends since 2006/07:

- Affiliated user groups 8,552.75 hrs. (+3.7%)
- City programs 748.20 hrs. (+6.5%)
- Leisure skating 695.67 hrs. (-40.6%)
- Other clients 923.08 hrs. (+26.8%)

For the 2010/11 regular winter season, use of **non-prime time** at city-owned arenas by the four broad customer groups was as follows, along with utilization trends since 2006/07:

- Affiliated user groups 660.5 hrs. (+4.4%)
- City programs 86.3 hrs. (+68.7%)
- Leisure skating 1,434.9 hrs. (+13%)
- Other clients 1,428.8 hrs. (-2.3%)

Note the shift over the past five seasons from prime time toward non-prime time hours for leisure skating. In the past five years, the number of hours of prime time allocated to ‘other’ clients has increased by 26%. The number of prime and non-prime time hours allocated to City programs has increased by 6.5% and 69% respectively.

Trends in Registration and Allocation of Prime and Non-Prime Time Ice in City-Owned Arenas for Affiliated Groups and the Ratio of Hours/Registrant (2006/07–2010/11) **Figure 3**

Group	Trends in Registration (06/07-10/11)	Trends in Allocated Hours (06/07-10/11)		Ratio of Hours Allocated per Registrant			
		Prime Time	Non-Prime Time	2006/07		2010/11	
				PT	NPT	PT	NPT
OMHA	+18%	-19.2%	-116.1%	7.42	0.51	5.09	0.19
NASC	+21%	+9.9%	-8.3%	1.98	0.19	1.75	0.14
OSC	-200%	-	-	-	-	0.95	0.23
CYO	-96%	+4.5%	-742.9%	1.15	0.11	2.36	0.03
OCHL	-4%	-2.9%	+33.9%	1.57	0.10	1.59	0.15
OGHA	No change	+29.8%	+42.9%	2.45	0.27	3.5	0.47
OSR	-10%	+19.2%	+83.9%	3.07	0.10	4.18	0.66

Note: The Oshawa Skating Club did not rent prime time ice in the 06/07 and 07/08 seasons in city-owned facilities, and only rented non-prime time ice in 2010/11. Pad #2 at the Campus Ice Centre is their ‘home’ rink.

Observations:

- Although current registration in the OMHA remains above the 2006/07 level, utilization of both prime and non-prime time has declined significantly.
- Although registration in the NASC was 21% higher in 2010/11 than in 2006/07, utilization of prime time has not increased as much and utilization of non-prime time is down.
- For the Region of Durham-based CYO, registration has declined steadily and a great deal over the past five seasons, but prime time utilization of Oshawa arenas has increased a little during that time. However, utilization of non-prime time ice has decreased a great deal. This is an indication of the availability of unallocated prime ice time.

- ❑ While registration in the OCHL declined and then rebounded over the past five seasons, utilization of prime time ice in the 2010/11 season is similar to five seasons ago. However, utilization of non-prime time ice has increased during that period.
- ❑ Note the trend of significantly increased utilization of prime and non-prime ice time by girl's hockey, even though registration peaked in 2008 and has recently retreated to the 2006 level.
- ❑ For Ringette, registration is down, but utilization of both prime and non-prime time has increased over the past five seasons.

Use of City-owned Arenas (2006/07 to 2010/11 seasons)

The utilization of prime and non-prime ice time in the regular winter season was analyzed over the past five seasons, since the current inventory of facilities has been in place. **Figure 4** summarizes total utilization of only the city-owned arenas.

The capacity numbers in **Figure 4** account for the shorter actual hours of prime time available due to reduced hours of operation.

Utilization of Prime and Non-Prime Ice Time at the Eight City-Owned Ice Surfaces (2006/07 to 2010/11 Regular Winter Seasons) Figure 4

	2006/07	2007/08	2008/09	2009/10	2010/11	% Change
Prime Time						
Recorded Capacity	12,941*	12,220.5	12,037	12,228	12,471	-3.77%
Total Permitted	10,586*	10,990.7	11,160.7	10,772.7	10,921	3.06%
Percentage Utilization	81.8%*	89.94%	92.72%	88.1%	87.56%	5.76%
Non-Prime Time						
Recorded Capacity	10,008*	7,109	6,630	6,044.5	6,128.5	-63.3%
Total Permitted	3,368.4*	3,141.95	3,011.2	3,210.5	3,610.46	6.7%
Percentage Utilization	33.66%*	44.2%	45.42%	53.11%	58.91%	25.26%
Total Prime and Non-Prime Time						
Recorded Capacity	22,949*	19,329.5	18,667	18,272.5	18,599.5	-23.39%
Total Permitted	13,954.4*	14,132.65	14,171.9	13,983.2	14,530.16	3.96%
Percentage Utilization	60.81%*	73.11%	75.92%	76.53%	78.12%	17.32%

Note: In the 2006/07 season, some time was allocated to the Civic Centre, in its final season of operation, thus the higher capacity for prime and non-prime time for 2006/07.

Observations:

- ❑ Total utilized prime time peaked in the 2008/09 season at 11,161 hours.
- ❑ Total utilized non-prime time was highest in the 2010/11 season.
- ❑ The amount of prime time available at city-owned arenas was reduced slightly over the past five seasons (-3.77%), with the amount of available prime ice time reduced for some ice surfaces and increased at others. See **Figure 5** below.
- ❑ The total amount of permitted and sold prime ice time increased slightly (3.06%).
- ❑ The overall annual percentage utilization of prime ice time ranged between 81.8% and 92.7%. The average annual utilization figure for each ice surface ranged from a low of 86.1% for Children's Arena and 86.6% for Legends Pad #4 to a high of 93.5% for Donevan Arena and 90.5% for Harman Park South Pad. The 2007/08 and 2008/09 seasons produced

the highest overall utilization figures. The 2010/11 season recorded the second lowest overall utilization rate at 87.6%.

- ❑ Overall, the amount of non-prime time available at city-owned arenas was reduced significantly over the past five seasons (-63.3%). See **Figure 6** below.
- ❑ Total permitted and sold non-prime time increased slightly (6.7%).
- ❑ Due to the reduced amount of available non-prime time, the utilization rate increased steadily over the five year period.
- ❑ Total available prime *and* non-prime ice time was steadily reduced (-23.39%) since 2006/07.
- ❑ The total amount of prime *and* non-prime ice that was permitted increased slightly (3.96%).
- ❑ Due to slightly less prime time and considerably less non-prime time ice being available and a slight increase in the utilization of prime and non-prime time ice, overall utilization increased by 17.32%.

Comparison of the Utilization of *Prime Time* Ice During the Regular Winter Season at the Eight City-Owned Ice Surfaces

Figure 5

Ice Surface	2006/07	2007/08	2008/09	2009/10	2010/11	% Change	Average
Children's Arena (capacity of PT <i>increased</i> by 0.78%)	82.76%	90.66%	91.8%	82.83%	82.33%	-0.43%	86.08%
Donevan Arena (capacity of PT <i>decreased</i> by 1.3%)	86.89%	93.27%	97.91%	94.05%	95.38%	8.5%	93.5%
Harman Arena – North Pad (capacity of PT <i>increased</i> by 11.6%)	91.59%	88.44%	91.04%	83.8%	83.94%	-7.65%	87.76%
Harman Arena – South Pad (capacity of PT <i>increased</i> by 8.89%)	83.99%	92.22%	97.77%	88.37%	90.3%	6.31%	90.53%
Legends Centre – Pad 1 (capacity of PT <i>decreased</i> by 3.51%)	81.05%	90.92%	93.95%	91.27%	90.1%	9.05%	89.46%
Legends Centre – Pad 2 (capacity of PT <i>decreased</i> by 5.15%)	88.94%	86.36%	87.93%	87.95%	88.67%	-0.27%	87.97%
Legends Centre – Pad 3 (capacity of PT <i>decreased</i> by 4.01%)	82.03%	90.91%	92.2%	88.69%	85.28%	3.25%	87.82%
Legends Centre – Pad 4 (capacity of PT <i>decreased</i> by 3.02%)	77.36%	89.81%	92.77%	88.46%	84.45%	7.09%	86.57%

Comparison of the Utilization of *Non-Prime Time* Ice During the Regular Winter Season at the Eight City-Owned Ice Surfaces

Figure 6

Ice Surface	2006/07	2007/08	2008/09	2009/10	2010/11	% Change	Average
Children's Arena (capacity of NPT decreased by 586%)	29.06%	87.13%	74.81%	41.94%	72.57%	43.51%	61.1%
Donevan Arena (capacity of NPT decreased by 16.2%)	54.85%	46.12%	60.07%	55.15%	64.66%	9.81%	56.17%
Harman Arena – North Pad (capacity of NPT decreased by 435%)	23.74%	98.08%	96.3%	88.18%	61.18%	37.44%	73.5%
Harman Arena – South Pad (capacity of NPT decreased by 1,727%)	19.23%	78.21%	340%	131.25%	59.46%	40.23%	125.63%
Legends Centre – Pad 1 (capacity of NPT decreased by 31.38%)	35.58%	37.17%	37.36%	47.35%	53.28%	17.7%	42.15%
Legends Centre – Pad 2 (capacity of NPT decreased by 26.96%)	53.67%	58.15%	62.7%	78.35%	81.68%	28.01%	78.51%
Legends Centre – Pad 3 (capacity of NPT decreased by 27.22%)	22.47%	28.58%	26.92%	35.23%	41.51%	19.04%	30.94%
Legends Centre – Pad 4 (capacity of NPT decreased by 15.88%)	26.47%	37.23%	31.07%	44.67%	51.39%	24.92%	38.17%

Observations:

- For five of the eight city-owned ice surfaces, the available amount of prime ice time was reduced over the past five seasons, which increases the percentage utilization figures for those facilities. For Children's and Harman Park arenas, the amount of available prime time was increased during the same period, and the amount of available non-prime time was greatly reduced as they became principally 'prime time' facilities.
- For all ice surfaces, the prime time utilization figures are below what is ideal (95%). Included in the utilization figures are outside groups who rented some prime and non-prime ice time at Children's; Harman Park and the Legends Centre.
- If arenas opened earlier and closed later on weekends to reflect the *official* definition of prime time, the utilization figure for the 2010/11 season would be 82% (based on 13,320 hours of capacity), rather than 87.6% (based on 12,471 hours of capacity).
- If the sale of unallocated prime time ice was removed from the totals, utilization figures would be lower (84.2% based on 12,471 hours of capacity and 78.9% based on 13,320 hours of capacity).
- The amount of non-prime time ice was reduced at all city-owned arenas over the past five seasons - ranging from a reduction of 1,727% at Harman Park Arena South, 586% at Children's Arena and 435% at Harman Park Arena North to 15.9% - 31.4% at the Legends Centre.
- With changes in the definition of actual available prime and non-prime time ice over the past five seasons, an examination of total utilization reveals that total use over the past five seasons increased by 8.2%, while total available ice time was reduced by almost 14%.

Utilization of the Campus Ice Centre and the General Motors Centre

As mentioned earlier, information about *community* utilization of the Campus Ice Centre and the GMC is less detailed than the data that is available for the city-owned facilities. The data used for the CIC and GMC was based on actual permitted hours from the City's permitting software and is based on estimated hours for the 2010/11 season. From this information, some *high level* calculations can be made.

Average Weekly Utilization of the Campus Ice Centre and the GMC, Based on the 30 Week Regular Winter Season (2010/11)

Figure 7

Facility	PT Hrs. Officially Available	Actual PT Hrs. Available	PT Hrs. Formally Allocated to Community Use	PT Hrs. Actually Made Avail. to Community Use	PT Hrs. Util. by Affiliated Groups & (Varsity Use)	Utilization of Actual PT by Affiliated Groups & Varsity Use	Additional PT Hrs. Sold	Total PT Hrs. Utilized	Overall Utilization of Actual PT
Campus Ice Centre #1	59	53	48	47	38 + (6) = 44	83%	9	53	100%
Campus Ice Centre #2	59	54	54	47	47 + (1) = 48	88.9%	4	52	96.3%
GMC #1	57	11.5	8	11.5	10	87%	0	10	87%
GMC #2	57	47	47	47	23	48.9%	4	27	57.4%
Totals	232	165.5	157	152.5	125	75.5%	17	142	85.8%

At an average of 85 hours/week, community use exceeded the 50 hours defined for community use at the Campus Ice Centre. At the GMC, community use is much less than the hours defined for that purpose in Pad #2, and slightly higher than defined at Pad #1. In total, 33 of the 55 hours allocated to community use were utilized in the 2010/11 season.

Some additional time was sold by the management group at the GMC, although those details were not available for this study. Most of the community hours at the GMC are at Pad #2. Even there, this facility was not very well used by the community. On the other hand, the Campus Ice Centre was very well used by community groups, the varsity program and other rentals. Overall utilization of prime time hours by the community, varsity programs and other rentals of the Campus Ice Centre was 98.1%. At the GMC, community use of actual prime time hours was 63.2%.

Combined Utilization of City-Owned Arenas, the Campus Ice Centre and the GMC

As illustrated in **Figure 8**, overall utilization of all publicly-accessible arenas was 87.1% during the 2010/11 regular winter season. For the eight city-owned arenas, the figure was 87.6%. Utilization of the Campus Ice Centre was much higher at 98.1% and the GMC was utilized the least at 63.1%.

**Combined Utilization of City-Owned
Arenas, the Campus Ice Centre and the GMC**

Figure 8

Facilities	Actual Hours of Prime Time Available	Hours of Actual Prime Time Utilized (affiliated groups, city programs, varsity program, rentals)	Percentage Utilization of Actual Prime Time
City-owned Arenas	12,471*	10,920	87.6%
Campus Ice Centre	3,210	3,150 (incl. community groups @ 2,550 hrs., varsity program @ 210 hrs. & rentals @ 390 hrs.)	98.1%
GMC	1,755	1,110 (incl. community groups @ 990 hrs. & rentals @ 120 hrs.)	63.2%
Totals	17,436	15,180	87.1%

Note: Actual prime time is less than official prime time and relates to when city-owned facilities are open, especially on weekends.

Typical Prime Time Hours Not Selected by Affiliated Groups and Available for City Programming

Certain prime time hours are unpopular with many arena user groups. For the 2010/11 season, the following was the pattern for all available ice surfaces:

Weekday Evenings (a total of 21 hours/week were not selected by user groups, in addition to 8 hours scheduled for leisure skating, 19 hours allocated to City programming, and 10.5 hours scheduled for the city-run adult hockey league – **totalling 58.5 hours**)

- 11 hours across all ice surfaces in the **first hour** of prime time (4:30-5:30, 5:00-6:00 and 5:15-6:15) – most at Harman Park South pad and Legends #1
- 5.5 hours across all ice surfaces in the **last hour** of prime time (9:00-10:00 and 9:15-10:15) – Children’s (1.5 hours), Harman Park North Pad (1 hour), Campus Ice Centre #2 (1 hour), GMC #1 (1 hour), and GMC #2 (1 hour)
- 4.5 hours across all ice surfaces in the **middle hours** of weekday prime time (GMC)

Weekends (a total of 66 hour/week were not selected by user groups, in addition to 18 hours scheduled for City programming, 17 hours allocated to leisure skating and 4 hours scheduled for the city-run adult hockey league – **totalling 105 hours**)

- Typically one or two early and late hours, but also early evening, mid morning, and part or all of afternoon blocks, - mostly at the Legends Centre, Harman Park North, Children’s, the Campus Ice Centre #2, and GMC #2 (only 5 hours per weekend allocated at GMC #2)
- In addition, there were 50 hours, mostly in the early morning and late evening on weekends where city-owned facilities were closed within defined hours of prime time.

The Least Popular Facilities (2010/11 season)

At most facilities, some prime time hours were not taken by affiliated groups. In some cases, City programs have been slotted into some of the less popular times. As many of those hours as possible are sold to other groups. For example, in the 2010/11 season, CYO took 25 prime time hours/week over their entitlement of 1 hour/week.

By far, the least popular facility for affiliated groups is **Pad #2 at the GMC**, with 22 hours of prime time/week on Friday evening and weekends not taken in 2010/11.

41 hours of prime ice time/week were not taken at the Legends Centre as detailed below.

- Pad #2** - 11 prime time hours/week were not taken (mostly on weekends) and 22 hours of prime time were allocated to City programs during weekday evenings and on weekends. That was in addition to 11 prime time hours of leisure skating.
- Pad #3** - 14 hours of prime time/week were not taken, mostly on weekends.
- Pad #4** - 9 hours of prime time/week were not taken, all on weekends.
- Pad #1** - 7 hours of prime time/week were not taken, during weekday evenings and on weekends.

Unpopular times at the other facilities included:

- Children's Arena** - 5.5 prime time hours/week were not taken and 6 hours were allocated to leisure skating (Friday evening and on the weekend).
- Harman Park North Pad** - 8 hours of prime time/week were not taken and 4 hours were allocated to leisure skating.
- Harman Park North South** - 3 hours of prime time/week were not taken.
- Pad #2 at the Campus Ice Centre** - 6 prime time hours/week were not taken, mostly on weekends.
- Pad #1 at the GMC** - 1.5 prime time hours were not taken during weekday evenings; however, this was off-set by users taking an additional 5 hours of prime time outside of the City's allocated hours at this pad.

Tournaments

During the regular winter season, 12 tournaments are currently scheduled in Oshawa arenas. Occasionally, other one-time events are added. Ten of the tournaments occur when the arenas are in full operation from October to March. One event occurs in September and another is in April, which does not impact regular season user groups. The ten tournaments that occur during the peak season are scheduled as follows:

- October 1
- November 2
- December 2
- January 1
- February 2
- March 2

- The October tournament utilizes all 4 pads at the Legends Centre and the 2 pads at the Campus Ice Centre, which disrupts regularly scheduled use.
- The first November tournament uses the Legends Centre, with no disruption to Campus Ice Centre users.
- The second November tournament utilizes the Campus Ice Centre, with no disruption to Legend Centre users.
- The first tournament in December uses all 4 pads at the Legends Centre and the 2 pads at the Campus Ice Centre, so there is disruption to regular users.
- The second tournament in December occurs from Dec 27 to 30 and has no impact on regular users as they do not permit ice during the Christmas break.

- The tournament in January uses all 4 pads at the Legends Centre and both pads at the Campus Ice Centre, so there is disruption to regular users. However, this tournament does not use all of the available ice time.
- The first tournament in February uses all 4 pads at the Legends Centre and both pads at the Campus Ice Centre, so there is disruption. There are actually two events (one at each facility) and the organizers also utilize ice time at the GMC, which does not allow for much replacement ice on this weekend.
- The second tournament in February uses all 4 pads at the Legends Centre and both pads at the Campus Ice Centre, so there is disruption to regular users. However, this event does not use all of the available ice time.
- The first tournament in March uses all 4 pads at the Legends Centre and both pads at the Campus Ice Centre; therefore, there is disruption to regular users.
- The second March tournament occurs during March Break and is a daytime tournament, so it does not affect regular use.

In summary - of the 12 events that are hosted each year, six impact regular users at both tournament locations over the regular winter season. Replacement ice is secured for many of the user groups, but it is not at the same times that they are accustomed to. Four tournaments have no impact (the September tournament, Christmas, March Break and April) and two have only partial impact as they use either the Campus Ice Centre or the Legends Centre, but not both.

Eleven of the tournaments support affiliated ice user groups:

- OMHA 3
- NASC 1
- OSC 1
- CYO 1
- OCHL 2
- OGHHL 2
- OSR 1

The amount of use of city-owned arenas to support tournaments has increased by almost 13% over the past five seasons, even as more tournament hours are moved to the Campus Ice Centre. Use of city-owned arenas in the 2010/11 season totalled 1,703.25 hours, up from 1,484 hours in the 2006/07 season.

Unallocated Prime Ice Time

Unallocated prime ice time represents hours that are available after negotiating with affiliated groups (as defined in the Ice Allocation Policy discussed above), based on their entitlement numbers and any extra time they request. The number of unallocated prime time hours has varied over the past seven seasons as noted below and has trended generally upward, especially in the last three years. The numbers include hours turned back by groups after the season begins. The numbers do NOT include the hours defined as prime time that are not available due to reduced hours of operation at city-owned facilities (50 hours/week or the 1,390 for the 2010/11 season).

- | | | | |
|----------------------------------|---------|----------------------------------|---------|
| <input type="checkbox"/> 2005/06 | 46/week | <input type="checkbox"/> 2009/10 | 80/week |
| <input type="checkbox"/> 2006/07 | 73/week | <input type="checkbox"/> 2010/11 | 84/week |
| <input type="checkbox"/> 2007/08 | 64/week | <input type="checkbox"/> 2011/12 | 81/week |
| <input type="checkbox"/> 2008/09 | 57/week | | |

For the 2010/11 regular winter season, the most unallocated prime time ice was at:

- the GMC - Pad #2 (22 hours/week),
- Pad #3 at the Legends Centre (14 hours/week),
- Pad #2 at the Legends Centre (11 hours/week),
- Pad #4 at the Legends Centre (9 hours/week),
- Harman Park North (8 hours/week), and
- Pad #1 at the Legends Centre (7 hours/week).

At Children’s Arena, 5.5 hours/week were available, and 3 hours were available at Harman Park South. Donevan Arena had no unallocated prime time hours. All of the above figures do not account for prime time hours that were not available due to shortened hours of operation.

For the 2010/11 regular winter season, a total of 1,699 unallocated prime time hours were identified as available at the city-owned facilities and approximately 885 unallocated hours at the Campus Ice Centre and the GMC (based on the weekly schedule or matrix: 29.5 hours/week x 30 weeks).

Only 416 of the 1,699 unallocated hours at the city-owned arenas were sold (24.5%). Oshawa residents rented 52 hours and 364 hours were rented to non-residents. Most of non-resident customers were from Clarington (61.7% of the hours), Whitby (14%) and Ajax (12.2%). That left 1,283 hours of prime time unallocated at the city-owned facilities.

For the 2010/11 season, 66.5 hours/week of prime and non-prime time over entitlement were requested by and sold to affiliated groups (mostly prime time). OSC, OLHA and DSSC may have taken more hours over entitlement, but this could not be calculated since the needs of these groups are not determined through the entitlement formula. Additionally, 77 hours/week were allocated to Leisure Skating, and 40 hours/week to other City programs and rentals.

As the amount of unallocated prime time has increased, the City implemented the following initiatives to help mitigate the impact on operational costs:

- Shortened the operational day at all facilities (early and late times that were not being used).
- Increased the amount of City programming,
- Allowed affiliated groups to purchase additional prime and non-prime time hours/week beyond their entitlement, and
- Advertised the availability of excess prime and non-prime time to unaffiliated customers.

For the 2010/11 winter season, 37 prime time hours/week were allocated to City programming that was regularly scheduled at the Donevan Arena and at Pads #1 and #2 at the Legends Centre. In addition, 14 prime time hours/week were scheduled for leisure skating.

If the amount of available prime time was increased by extending the hours earlier and/or later into weekday evenings and/or the time that facilities are open on weekends, the amount of unallocated prime time would increase. As noted above, if arenas were open for all for the *officially* defined prime time, an additional 50 hours of prime would be available each week, at the eight city-owned ice surfaces.

3.0 Demand

3.1 Recent and Current Demand

Current utilization and trends in utilization of arenas in Oshawa were described in Section 2, along with a description of the major user groups and recent trends in registration and arena utilization by each. Trends over the longer term and likely patterns of future demand for ice sports and related activities are discussed below.

For some time, demand for ice-sports by male groups has been in gradual decline across much of Ontario and in Oshawa. For some male groups in Oshawa, registration peaked between 2002 and 2005, although slight increases for some groups are being recorded heading into the 2011/12 season, especially from the youngest age group. Registration by the older youth is declining as the big Echo generation ages out of their minor sports years. For all male Oshawa groups, registration in 2010 was below that of 1996. Over the past five years, combined registration among OMHA, NASC Hockey, OCHL and CYO has been in the 2,425 to 2,511 range, with the number lowest in 2009.

There is unique competition for the declining number of child and youth skaters among the three principle hockey groups in Oshawa (OMHA, NASC and OCHL) and CYO which operates in Oshawa and Whitby. If the three Oshawa groups combined into one minor hockey organization, there would be less confusion for the customer, improved co-ordination and organizational efficiency and less strain on volunteer organizers. There would also be increased efficiency in ice time allocation, and less ice time would be required overall. As in most communities, the house league component could focus on the weekends and rep hockey on weekday evenings, which would make it easier on parents, most of whom have better access to weekends than weekday evenings. Increased appeal for and utilization of weekend ice time would be a significant benefit.

Although the numbers are smaller, participation across Canada in girls and women's hockey has generally trended upward over the past fifteen years. However, in Oshawa, registration in girls hockey peaked in 2008, and participation in Ringette and figure skating are both below the levels of the mid 1990s. Current (2010/11) registration in all female ice sports is 978, and has declined each year since peaking in 2007.

3.2 Indicators of Future Demand for Arenas

The key sources of information to help predict future demand for arenas are the following:

- anticipated growth in the population within the City and the surrounding area, especially the age groups that are the principle winter customers of arenas;
- anticipated changes in the age profile of the Oshawa community;
- local, provincial and national trends in participation in ice-related leisure activities;
- expansion and improvement of arenas by neighbouring municipalities;
- the impact on ice sports of increasing interest in indoor soccer and other indoor field sports;

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The RETHINK GROUP, *Leisure Services Planning and Management*

- the growing market for tournaments; and
- the changing ethno-cultural composition of the Oshawa area.

Projected Population Growth and Change for Oshawa

Three population projections have been examined for the City Oshawa.

In November, 2004, demographer John Kettle prepared *age-specific* population projections for the City of Oshawa to support the 2005 Parks, Recreation and Culture Strategy. Projecting from the 2001 census, five-year projections to 2026 were calculated as follows:

- 2001 140,191
- 2006 148,839 (2006 census: 145,530)
- 2011 156,776
- 2016 165,065
- 2021 173,688
- 2026 182,016

In 2008, Watson and Associates Economics Ltd. completed a projection to 2019 to support the update of the Development Charges By-law. This projection was based on: i) the 2006 census, ii) projected residential housing units (new and infill), and iii) the declining ratio of persons per household and population decline in some neighbourhoods, as the population ages. Allowing for a 2.87% population undercount relative to the 2006 census, this analysis projected the following:

- May, 2006 145,654 (2.65 persons/unit)
- early 2009 148,923 (2.62 persons/unit)
- early 2019 158,068 (2.49 persons/unit)

In 2008, the Watson projections predicted declining population in the following older neighbourhoods of Oshawa, influenced by an aging population – resulting in fewer persons per household, particularly in those neighbourhoods.

- | | |
|--------------------------------------|---------------------------------------|
| <input type="checkbox"/> McLaughlin, | <input type="checkbox"/> Vanier, |
| <input type="checkbox"/> Northwood, | <input type="checkbox"/> Central, |
| <input type="checkbox"/> Northglen, | <input type="checkbox"/> Donevan, and |
| <input type="checkbox"/> Centennial, | <input type="checkbox"/> Lakeview. |
| <input type="checkbox"/> O’Neil, | |

For Oshawa, it is predicted that the ratio of persons per household will continue to decline from 2.65 in 2006 to 2.49 by 2019.

In 2009, population projections were completed by Watson and Associates Economics Ltd. to support the Region of Durham Official Plan. Amendment 128 of the Durham Region Official Plan provided the following five-year targets for total population to 2031 for the City of Oshawa.

- | | |
|--|--|
| <input type="checkbox"/> 2011 153,585 | <input type="checkbox"/> 2026 184,460 |
| <input type="checkbox"/> 2016 165,390 | <input type="checkbox"/> 2031 197,000 |
| <input type="checkbox"/> 2021 174,695 | |

Based on the Regional projections, the City of Oshawa is predicted to grow by 28% over the next twenty years (average of 1.4% per year). Over the past twenty years, the City has grown an average of 1.38% per year or 27.5% (1981–2010).

Note: the City of Oshawa Department of Planning and Development Services estimates that the current population of the City at approximately 151,500.

Although the projection by John Kettle and the Region of Durham are both higher than the City of Oshawa Department of Planning and Development Services estimate for the 2011 population, that is not unexpected, given the unforeseen economic downturn of the past three years. However, if the average annual increase over the past twenty years can be achieved to 2031, the Kettle and Regional projections may also be achieved by that time.

Since the 2004 Kettle projections are very close to the 2009 regional projection, the age-specific percentages established in the Kettle projections can be used as a *broad indicator* of expected changes in the age profile of Oshawa residents to 2026. **Figure 9** below provides the projected percentage change by broad age groupings for 2011, 2016, 2021 and 2026. Utilizing the Kettle percentages for each age grouping and the most recent Durham Region population projections, an estimate of the population numbers in each age category have been calculated.

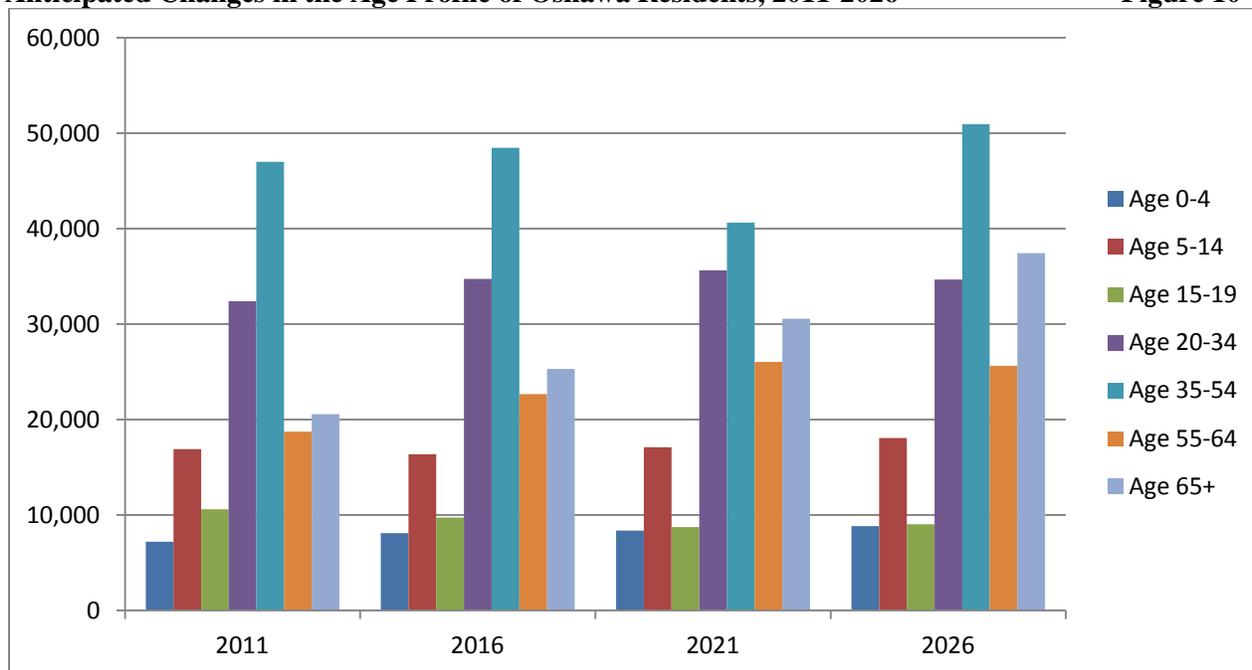
Projected Change in the Age Profile of the Oshawa Population, 2011 to 2026 **Figure 9**

Generational Age Groupings	2001*	2006*	2011	2016	2021	2026
Total Population	140,191	145,654	153,585	165,390	174,695	184,460
0-4 Pre-school	8,535	7,674	7,226	8,104	8,385	8,854
5-14 Elementary School	19,745	18,537	16,894	16,374	17,120	18,077
15-19 Secondary School	9,266	10,282	10,597	9,758	8,735	9,039
20-34 Young Adults	30,115	27,723	32,406	34,732	35,638	34,678
35-54 Mid-Life Adults	43,782	45,813	46,997	48,459	48,041	50,911
55-64 Empty Nesters	12,300	15,935	18,737	22,658	26,030	25,640
65+ Senior Adults	16,448	19,700	20,580	25,305	30,572	37,445
Age Groupings as a % of the Total Population	%	%	%	%	%	%
0-4 Pre-school	6.1	5.3	4.9	4.9	4.8	4.8
5-14 Elementary School	14.1	12.7	11.0	9.9	9.8	9.8
15-19 Secondary School	6.6	7.1	6.9	5.9	5.0	4.9
20-34 Young Adults	21.5	19.0	21.1	21.0	20.4	18.8
35-54 Mid-Life Adults	31.2	31.5	30.6	29.3	27.5	27.6
55-64 Empty Nesters	8.8	10.6	12.2	13.7	14.9	13.9
65+ Senior Adults	11.7	13.5	13.4	15.3	17.5	20.3

Sources: John Kettle, November, 2004; Census 2001 and 2006; and Amendment 128, Durham Region Official Plan, 2009.

Note: 2001 and 2006 represent the census population, adjusted for undercounts.

Figure 10 on the next page illustrates the information in **Figure 9** in graphic form.



Only the Secondary School Age Group is Expected to Decline in Number

The City of Oshawa is projected to increase in population by around 20% by 2026 and about 28% by 2031. Between 2011 and 2026, the only age group that is not anticipated to increase in number along with the overall population is the secondary school market (age 15-19) which is projected to decrease by 1,558 or close to 15%. During the next fifteen years, the senior adult population is predicted to increase the most (82% or 16,865), followed by the empty nester population (36.8% or 6,903). The elementary school, young adult and mid-life adult populations are projected to increase only marginally in the range of 7% to 8%. See below for details.

Projected 2011-2026 change in the total population:	30,875 (20.1% increase)
❑ Projected change in the pre-school population:	1,628 (22.5% increase)
❑ Projected change in the elementary school population:	1,213 (7.2% increase)
❑ Projected change in the secondary school population:	-1,558 (14.7% decrease)
❑ Projected change in the <i>elem. + sec. school</i> population:	-375 (1.36% decrease)
❑ Projected change in the young adult population:	2,272 (7.0% increase)
❑ Projected change in the mid-life adult population:	3,914 (8.3% increase)
❑ Projected change in the empty nester population:	6,903 (36.8% increase)
❑ Projected change in the senior adult population:	16,865 (81.9% increase)

Impact on the Demand for Leisure Activities

These expected changes in the age profile of the Oshawa population will have significant impact on demand for minor sports and participation in sports by adults over the next 15-20 years. With the pool of potential customers for minor as well as young adult sports remaining relatively static over the next 15-20 years, and the pool of potential customers for mid-life adult sports growing slowly – the only way that each sport will be able to grow appreciably is by finding ways to capture a larger share of each of their specific age profiles. In recent years, girls and women’s

hockey, soccer and especially indoor soccer have been able to accomplish that, while figure skating, Ringette, and boys and adult male ice hockey have been less successful. The relatively recent growth in numbers for young adult hockey and be mainly attributed to the aging of the big Echo generation that is age 17-32 in 2011.

Projected Growth in Population in the Durham Region

The population of Whitby, Clarington, Ajax, Pickering, Uxbridge and Scugog is projected to increase to 758,000 by 2031, an increase of 271,630 or 56%. That is exactly double the rate of growth projected for the City of Oshawa.

In the past five years, the inventory of ice surfaces has not increased in those municipalities. The current ratio of ice surfaces to population in the study area is 1 per 16,212 and varies considerably among communities as noted below. Note also the ratio of ice surfaces to the principle users (age 5-19), based on 2006 population data. *Age-specific details for 2011 will not be available until the 2011 census is published.*

<input type="checkbox"/> Oshawa (10.5)	1 ice surface:14,429 population (1ice surface:2,668 5-19 year olds in 2006)
<input type="checkbox"/> Whitby (10)	1 ice surface:12,500 population (1ice surface:2,589 5-19 year olds in 2006)
<input type="checkbox"/> Clarington (5)	1 ice surface:17,600 population (1ice surface:3,731 5-19 year olds in 2006)
<input type="checkbox"/> Ajax (5)	1 ice surface:22,300 population (1ice surface:4,413 5-19 year olds in 2006)
<input type="checkbox"/> Pickering (5)	1 ice surface:22,000 population (1ice surface:4,049 5-19 year olds in 2006)
<input type="checkbox"/> Uxbridge (2)	1 ice surface:10,500 population (1ice surface:2,214 5-19 year olds in 2006)
<input type="checkbox"/> Scugog (3)	1 ice surface: 7,500 population (1ice surface:1,470 5-19 year olds in 2006)

Note: The ratio of ice surfaces to population in Oshawa is based on an estimated 2011 population of 151,500 and the equivalent of 10.5 publicly-available ice surfaces.

Note the significant differences among the lakeshore communities and between the rural and urban communities. Ajax, Pickering and Clarington are considerably under-serviced compared to Whitby and Oshawa. The differences are particularly noticeable when comparing the service level for 5-19 year olds. The proportion of 5-19 year olds is much lower in the City of Oshawa and the Township of Scugog, a characteristic of slower-growing communities.

As noted earlier, the only community within the study area to report any firm plans for arena expansion was the Town of Ajax. They are anticipating a Phase II of the new Audley Recreation Complex by around 2016, but have not committed to the facility components. The first phase of facility development did not include ice surfaces.

Not surprisingly, the most prime time ice rented in Oshawa arenas by out-of-town customers is from groups in Clarington, followed by groups in Whitby. If neighbouring communities are slow to respond to increasing local demand by building new arenas, demand to rent ice time in Oshawa arenas will increase. Conversely, if regional supply increases sufficiently, demand for out-of-town rental of prime ice time in Oshawa arenas will decrease.

Leisure Trends

Trends in participation in various leisure activities are influenced by a number of factors including the following:

- availability of suitable facilities at suitable times;
- the cost to participate;
- skills and physical ability;
- ethno-cultural background;
- the changing size of the market for each activity from which to attract participants;
- the ability to increase market share within the pool of potential customers;
- the quality of the organization offering the activity (leadership, customer service, marketing, etc.); and
- changing societal attitudes toward particular activities and types of facilities (e.g., general popularity, perceived benefits, environmental impacts, social acceptability, etc.).

For ice sports, all of the above factors apply to varying degrees. Available ice time in attractive facilities at attractive times can expand demand within existing groups, and provide the opportunity for new groups, leagues and programs/uses to flourish. High cost to participate will make some ice sports/activities unaffordable for a significant segment of the population – especially compared to some other sports. Most ice sports require the ability to skate and participants must learn how to effectively participate in each sport. Ice sports are an unknown activity to the culture of many new immigrants, and the cost and skill barriers can further reduce participation levels.

One of the most influential factors on demand for ice sports is the shrinking size of the child and youth market as the large Echo generation (age 17-32 in 2011) ages into their young adult years, which is reducing the number of available children and youth, and increasing the size of the young adult market. At the same time, the Baby Boom generation (age 46-65 in 2011) is beginning to age out of their ‘old timer’ organized hockey years, but still may be interested in the occasional pick-up game and leisure skating. As was discussed earlier, the pool of potential customers for minor as well as young adult sports is expected to remain relatively static over the next 15-20 years, and the pool of potential customers for mid-life adult sports is projected to increase a little during that same period. The only way that each ice sport will be able to grow appreciably is by finding ways to attract a larger share of each of their specific age profiles – sometimes by drawing from competing sports.

Some ice sports have been able to increase the market share of participants within the principle age group that participate in their sport. Examples include girls and women’s hockey, both of which have grown at a faster rate than male hockey over the past decade.

The environmental ethic has turned some people away from *energy-hungry* facilities like arenas, especially when they are operated in the warm season. Increasing interest in the health benefits of sports has attracted an increasing number of people to participate in ice sports and related activities. Sports offer other benefits, including nurturing sportsmanship, teamwork and leadership. Hockey has always been one of the most popular team sports in Canada and is currently number two behind soccer.

From the *2005 Statistics Canada General Social Survey*, it was reported that regular participation in sports in general declined from 57% to 51% for children aged 5-14 between 1992 and 2005. Boys were more likely to participate than girls, but the gap narrowed during that period from 66%/49% in 1992 to 56%/45% in 2005 for males and females. The participation rate for most sports declines with age, with the rate peaking in the 15-19 age group. *Since 2005, participation in most sports has likely declined further as the Echo generation has continued to age out of their minor sports years.*

Hockey

Hockey Canada reports that male participation across the country has increased by only 28,133 over the past 11 years, a 6.1% increase or an average of 0.55% per year. That is well below the rate of increase in Canada's population which averaged about 1% per year during that period. For girls' hockey, registration is up 42,203 or 97.2% over the same period (averaging close to 9% per year). When compared to the 5-19 age group, the participation rate for males was up slightly from 15% to 16% of that age group between 2003 and 2010. For girls, the participation rate increased from 3% to 4.75% of that age group for the same period. From the *1992 and 2005 General Social Surveys*, Statistics Canada reported that participation in organized hockey declined from 12% to 11% during that period.

Over the past five years, registration in the OMHA, NASC and the OLHA has increased, and for the OCHA, registration declined only slightly. Registration in girl's hockey peaked in Oshawa in 2008 and has declined by 8% since then. Between 2006 and 2010, participation in male child and youth hockey (OMHA, NASC, OCHL and CYO) was relatively stable in the 2,500 range, but showed a slight decline in 2009 and 2010. See **Figure 11** below.

Figure Skating

Participation trend data was not available from Skate Canada, but US Figure Skating reported that participation in figure skating peaked in 2002/03 for 'regular' members and in 2005/06 for 'basic skills' members. This is in line with the aging of their big Echo generation, which is one year ahead of Canada. The sample size of the *2005 Statistics Canada General Social Survey* was not large enough to determine accurate participation numbers for figure skating for either benchmark year.

As noted in **Figures 11** below, participation in figure skating in Oshawa peaked in 1997 and has declined 86% since that time. Over the past five years, registration peaked in 2006 and 2007, and was at its lowest point in 2010.

Ringette

The sport originated in 1963 in North Bay. Since then, it has spread around Ontario and across Canada. It is also played in the U.S.A., Finland, Sweden, Russia and France, and is being demonstrated in the Netherlands, New Zealand, Australia, West Germany and Japan. Currently, there are 25,125 participants and more than 2,000 teams across Canada. Ringette Canada does not publish any participation trend information. In Oshawa, participation peaked in 1996 and has declined by 44% since then. In the past five years, registration peaked in 2007, and was second lowest in 2010.

Registration is Declining for Both Male and Female Ice Sports and Activities

Although participation has increased over the past fifteen years, overall participation in female ice sports has declined significantly over the past five years (peaked in 2007) - influenced mostly by figure skating and Ringette. Participation by all male groups is also down over the past fifteen years, but has been steady over the past five years.

Fifteen-Year Trends in Registration for the Principle Ice User Groups of Oshawa Arenas

Figure 11

Group	1996	2001	2006	2010	Peak Year	Trends
OMHA	962	721	455	557	962 (1996)	42% decline (1996-2010) 18% increase since 2006
NASC Hockey	941	758	628	790	1053 (2002)	25% decline (2002-2010) 16% decline (1996-2010) 21% increase since 2006
OCHL	1017	1035	900	865	1070 (2002)	19% decline (2002-2010) 15% decline (1996-2010) 4% decline since 2006
CYO	420	528	528	269	568 (2005)	53% decline (2005-2010) 36% decline (1996-2010) 96% decline since 2006
OGHA	112	285	469	467	509 (2008)	8% decline (2008-2010) 317% increase (1996-2010) 21.4% decline since 2006
OLHA	47	60	106	228	228 (2010)	385% increase (1996-2010) 54% increase since 2006
OSR (Ringette)	232	82	144	131	232 (1996)	44% decline (1996-2010) 10% decline since 2006
OSC	897	422	456	152	1053 (1997)	86% decline (1997-2010) 200% decline since 2006
Male hockey groups	3340	2514	2511	2481	3340 (1996)	26% decline (1996-2010) 1% decline since 2006
Female hockey groups	159	345	575	695	695 (2010)	337% increase (1996-2010) 17% increase since 2006

Five-Year Registration Patterns for the Principle Ice User Groups of Oshawa Arenas

Figure 12

Group	2006	2007	2008	2009	2010
OMHA	455	612	580	534	557
NASC	628	576	765	740	790
OCHL	900	870	767	819	865
CYO	528	451	388	332	296
All Male Groups	2511	2509	2500	2425	2508
OGHA	469	453	509	386	467
OLHA	106	148	169	203	228
OSC (figure skating)	456	456	286	289	152
OSR (Ringette)	144	163	68	150	131
All Female Groups	1175	1220	1035	1028	978
DSSC (speed skating)	22	29	52	76	57
City Programs	1255	1775	1856	1645	1882

Trends in Registration/Participation in the Past Five Years

Figures 11 and 12 describe various trends in participation/registration for the principle users of arenas in Oshawa. Although four groups have been in decline since either 1996 or 1997, two groups peaked in 2002, one group peaked in 2005 and another peaked in 2008 – the trend in registration since 2006, when groups began to adjust to the current supply of ice surfaces is the most relevant to the analysis of demand.

Since 2006, only OMHA, NASC and OLHA have shown increases of 18%, 21% and 54% respectively, although OMHA peaked in 2007 and is down 9% since then. OCHL has only shown a 4% decline, and although registration dipped significantly in 2008, they have been able to remain relatively stable over the past five years. Although registration in CYO increased for the 2011/12 season, their numbers are down over the past five years. Although registration in OGHA is up 317% since 1996, registration has declined by 8% since 2008. Registration in figure skating has been declining since 2007 and is down 86% since 1997. Registration in Ringette has been fluctuating between 68 and 163 over the past five years, and is down 44% since 1996.

Trends in Registration are not Always Aligned with Trends in Ice Time Allocation

As note in Section 2, trends in registration have not always aligned with trends in allocation of ice time. Although the OMHA has increased in registration by 18% over the past five years, their allocation of prime and non-prime ice time has declined by 19% and 116% respectively. Similarly registration in NASC Hockey has increased by 21% over the past five years, but they have only increased their allocation of prime ice time by 10% and have decreased their allocation of non-prime ice time by 8.3%. Registration in the CYO declined by 96% over the past five years, but they increased their allocation of prime ice time by 4.5%, while reducing their allocation of non-prime time by 743% (possibly a reflection of the increasing availability of desirable prime time). The OCHL has remained steady over the past five years, but they have increased their allocation of non-prime time by 34%. In 2010, the OGHA had similar registration to 2006, but increased their allocation of prime ice time by 30% and non-prime time by 43%. The OSR has declined in registration by 10% but increased their allocation of prime ice time by 19% and non-prime ice time by 84%.

As introduced earlier, the hours of unallocated prime time have been increasing, especially in the last three seasons and are now almost double what they were in 2005/06 – above 80 hours per week. That does not include the 71 hours of *official* prime time that was not available due to reduced hours of operation in publicly-available facilities.

User Group Opinions about Growth Potential

Current users of Oshawa arenas were consulted about their perspectives on future demand for their respective organizations. Although registration for the 2011/12 season was not complete at the time of the discussion, the groups expressed the following opinion. *Some groups were not able to attend the meeting.*

- NASC Hockey** (house league hockey) – has grown an average of 5%/year over past five years – they feel that near future growth could be in the range of 8%/year (even as the size of their market declines) – although small, an increasing proportion of out-of-town registrants noted

- ❑ **OCHL** (house league hockey) – seeing some increasing registration at the younger age groups – could increase slightly in overall number in near future – although small, an increasing proportion of out-of-town registrants noted
- ❑ **CYO** (house league and rep hockey) – increasing registration at the younger age group – will cap registration at 390 (currently at 340) – only 25 Oshawa residents in 2010/11 – CYO can offer body checking while other groups cannot
- ❑ **OMHA** (rep hockey) – future growth will depend on the growth of the house leagues which feed OMHA registration and on their ability to form AE (Alternative Entry) teams at the younger age groups – although small, an increasing proportion of out-of-town registrants noted
- ❑ **DSSC** (recreation and competition speed skating) – future uncertain due to strong organization in Clarington and limitations at the GMC for storage of their mats – three quarters of registrants are non-resident and the proportion is increasing
- ❑ **OGHA** (house league and rep girls hockey) – proportion of non-residents is currently at 23% and has been fluctuating in the 4% to 45% range
- ❑ **OLHA** (women’s hockey) – could expand more, but is careful in taking additional ice time – non-resident registration is currently at 68% and has fluctuated between 0% and 68% over the past five years
- ❑ **OSC** (figure skating) – has been taking less ice time over the past few years – registration is down 200% over past five years and 86% since 1996 - non-resident registration is currently at 56% and has fluctuated between 45% and 64% over the past five years
- ❑ **OSR** (house league and rep Ringette) – registration is down 200% over past five years and 86% since 1996 - non-resident registration is currently at 42% and has fluctuated between 28% and 56% over the past five years
- ❑ **Adult male hockey** – interest in shinny hockey has declined recently, while interest in organized adult leagues has increased – could be an overall increase in adult hockey as the Echo generation ages into their young adult and later years – however, as the Baby Boom ages out of their 40s and early 50s, demand from this older adult group will decline rapidly

Increasing Demand for Tournaments during the Winter Season

Over the past five years, the number of hours of prime time allocated to tournaments has been increasing, influenced by the improved supply of arenas in Oshawa and the clustering of ice surfaces at the Legends Centre, Campus Ice Centre and General Motors Centre. This trend in tournaments is influenced by demand and can be controlled by the facility supplier. The City of Oshawa, with input from its users and through the Ice Allocation Policy, has decided to limit the number of tournaments in its facilities and the number of prime time hours allocated to this use in order to minimize the negative impact on its seasonal customers.

Leisure Skating

Leisure or recreational skating has long been associated with children and families with children, and programs have been designed to attract this demographic group through targeted marketing, the music played and the times of the days and week that the programs are offered. Since it is projected that the child and youth market will be relatively stable over the next ten to fifteen years, demand for leisure skating from this age group should remain relatively stable.

However, demand for leisure skating should increase from another group. The growing adult market, fuelled by aging Baby Boomers, are becoming increasingly interested in improved fitness and will be looking for activities that are also social, inexpensive, flexible and do not require an organized group in which to participate. As Boomers retire, they will have more flexibility in the time of day in which they are available to skate. Most adults would prefer to skate with other adults, rather than compete with faster and more agile young people. If skating programs are well marketed, and scheduled and designed to be attractive to adults, increased participation can be anticipated. Some of those programs can be offered in non-prime time hours.

There are Many Unknowns in Predicting Future Demand

Current and anticipated trends in registration/participation for any sport are influenced by such things as:

- an increase or decrease in the size of the potential market from which to draw participants,
- increasing or decreasing interest in a sport,
- the quality of the operation and leadership of a program or league,
- the impact of marketing for a program or sport,
- the quality and availability of facilities,
- competing activities within the same population group, and
- the economy in general and the ability of individuals and families to afford to participate.

Factors such as the economy, the leadership of a group and the availability of adequate facilities can change relatively quickly. That is why it is difficult to predict demand for leisure activities with complete certainty. That is also why predictable change in the age profile of the population has proven to be the most useful indicator of the potential for broad, long-term shifts in the demand for specific leisure activities.

Summer Use of Arenas

Recently, there has been an increase in demand for arena floors for lacrosse, ball hockey and other 'ice-out' floor-based sports and activities. Since this was not a focus of this study, statistics were not researched and analyzed.

Shifting Ethno-Cultural Composition

It is anticipated that the increasing proportion of foreign-born residents and the changing ethno-cultural profile of the Oshawa population may reduce demand for ice sports – with Asia expected to be the prominent region of origin for the quarter of the Oshawa area population that are expected to be comprised of foreign-born residents by 2031. Refer to **Appendix C** for more detail.

Children of recent immigrant families (less than ten years in Canada) were less likely to participate in sports (32% compared to 55% for non-immigrant families), according to the **2005 Statistics Canada General Social Survey**. According to the survey, one of problems that recent immigrants face is achieving economic stability in their new country. With many sports, such as hockey, figure skating, Ringette and speed skating requiring significant investment in equipment, lessons and participation fees, children of recent immigrants face significant financial as well as skill barriers to ice sports participation.

The Impact of Competing Winter Sports

The new 106,000 square foot field house with its 70x100 metre multi-sport field has recently opened at the Civic Recreation Complex. This facility will accommodate many sports including soccer, field lacrosse, football, Ultimate Frisbee, field hockey and rugby. Participation in indoor soccer in Ontario has been growing rapidly, influenced by an expanding and improving facility base, lower participation costs and less required skill - compared to hockey. It may be that the availability of these sports, which can now be played during the winter season in Oshawa, will draw away existing and potential participants from minor and adult hockey as well as figure skating and Ringette. These ‘field-based’ indoor sports will be especially appealing to the increasingly multi-cultural population of the community.

Resident-Non-Resident Mix

Almost 30% of participants in ice-related activities utilizing Oshawa arenas are non-residents. For the 2010/11 winter season, the breakdown by group and use was as follows:

<input type="checkbox"/> male hockey	14.9%	<input type="checkbox"/> DSSC (speed skating)	71.9%
<input type="checkbox"/> girls hockey	23.1%	<input type="checkbox"/> City programs	38.6%
<input type="checkbox"/> women’s hockey	67.5%	<input type="checkbox"/> all male-oriented groups	14.9%
<input type="checkbox"/> Ringette	42.0%	<input type="checkbox"/> all female-oriented groups	41.1%
<input type="checkbox"/> Oshawa Skating Club	55.9%	<input type="checkbox"/> all groups and programs	28.5%.

The above figures do not include groups who rent unallocated ice time. The majority of users of unallocated hours came from Clarington (61.7%), Whitby (14%) and Ajax (12.2%) - with 12.5% rented by Oshawa-based groups.

3.3 Conclusions about Future Demand

Population growth for Oshawa is expected to be in the range of 1-1.4% per year over the next twenty years. However, the aging of the big Echo and Baby Boom generations will result in slow or no growth for the principle age groups that utilize Oshawa arenas, with declining population numbers projected for youth (age 15-19). The 0-19 age group has been declining in size in Oshawa since 2001 and is not expected to increase in size until after 2021, as the youngest segment of this age group begins to increase in size by that time.

This anticipated slow growth of the principle market that uses arenas, coupled with the increasing influence of foreign-born residents with typically lower than average interest in ice sports, and anticipated competing demand from indoor soccer and other field sports in winter suggests that *demand from Oshawa residents for arenas is not expected to grow very much over the next fifteen to twenty years*. Most of the recent demand for child and youth hockey has been influenced by the big Echo generation, which has now pretty well aged out of their minor sports years. The 5-19 age group that is following the Echo generation is much smaller in size.

As noted earlier, if the principle user groups can increase their market share, demand could increase at a rate that is greater than the rate of population growth for their respective market groups. However, that has only happened for girls and women’s hockey.

Although demand appears to be increasing, the impact of tournaments can be influenced by the policies of the major suppliers.

Interest in leisure skating is expected to increase, influenced mostly by the aging Baby Boom generation.

Although it is not the responsibility of the City of Oshawa to provide ice time for non-residents, demand for ice time from growing communities within the Region will increase unless those municipalities add significantly to their supply of arenas. As noted above, the need to ‘fill out’ the rosters of some affiliated user groups (e.g., CYO, OGHA, OLHA, OSC, Ringette and speed skating) requires notable non-resident registrants to sustain these groups.

4.0 Requirement for Ice Surfaces to Meet Current and Future Demand

4.1 Requirement for Ice Surfaces to Meet Current Demand

There is currently a surplus of between 1.6 and 2.2 publicly-available ice surfaces in the City of Oshawa, depending on the definition of prime time and the corresponding level of service provided. As described in detail in Section 2, this determination has been based on:

- the hours of operation at all publicly-available ice surfaces during the 2010/11 regular winter season,
- the hours of prime time available at all publicly-available ice surfaces during the 2010/11 regular winter season,
- the hours of *officially* defined prime time that were not available, particularly at city-owned ice surfaces due to reduced hours of operation during the 2010/11 regular winter season,
- the 2010/11 allocation of prime time to affiliated groups,
- requests from affiliated groups for additional prime time hours,
- prime time hours returned from affiliated groups after the beginning of the season,
- the 2010/11 level of City programming and rentals during prime time, and
- a target of 95% utilization of prime time.

Indicators of Surplus Prime Time

Since 2006, when the expansion of arenas was completed, there has been excess prime ice time.

- Affiliated groups have been able to receive all of their entitlement, based on the allocation formula and have been able to take additional hours if desired to expand their programs – for skill development, and to extend practice time and games. For the 2010/11 season, five groups took 66.5 hours/week of additional time, mostly prime time.
- Affiliated groups have also been able to be quite selective in the prime time hours that they choose, leaving blocks of relatively attractive time available for groups like CYO to expand their entitlement. This has also allowed the City to schedule programming at times that would not be available in most communities (e.g., prime time weekday evenings and on weekends at Children’s, Donevan and Harman Park North arenas, as well as at the Legends Centre and GMC). For the 2010/11 season, 77 hours/week were allocated to leisure skating, and 40 hours/week to other City programs and rentals.
- The number of unallocated prime time hours per week and season has been increasing since 2006 and for the 2010/11 season totalled approximately 2,584 hours.
- As noted throughout this report, arenas are operating on a schedule of reduced hours in non-prime time at Children’s and Harman Park arenas, and during prime time at all city-owned facilities, due to insufficient demand. For the 2010/11 regular winter season, 50 prime time hours/week (1,380 hours/season) were not made available due to reduced hours of operation.

The calculation of unallocated prime ice time across all ice surfaces for the 26-30 week 2010/11 regular winter season revealed the following:

- ❑ 1,699 unallocated prime time hours at the eight city-owned ice surfaces
- ❑ 885 (approximately) unallocated prime time hours at the CIC and GMC
- ❑ 2,584 total unallocated prime time hours (approximately)

The unallocated hours were divided by 1,560 (the average number of prime time hours per week available per ice surface in Oshawa during the 2010/11 season or 54.4 hours/week x 30 weeks for eight ice surfaces and 26 hours/week for four ice surfaces). That equals the prime time available in **1.66 ice surfaces**, based on reduced hours of operation.

If the 50 additional hours/week (1,380 hours/season) of prime time that was unavailable due to reduced hours of operation at the city-owned facilities is factored in, the total hours of unallocated prime time would have been 3,964 for the 2010/11 season. Based on an average of 60.5 prime time hours per week x 30 weeks for eight ice surfaces and 26 weeks for four ice surfaces (1,734 hours/week), those unallocated prime time hours would equate to the prime time available in **2.29 ice surfaces**. *The figure of 60.5 is the average hours of prime time per week that would be available at each ice surface if arenas were open for all of the 'officially' defined prime time.* See pages 17-19 for details.

95% Utilization Target

However, the 1.66 and 2.29 figures slightly overstate the surplus, since the objective should not be to utilize 100% of all available prime time. That does not allow for any flexibility in scheduling and ensures that most groups will have to take some or a good deal of less than desirable hours. In 2010/11, the eight city-owned ice surfaces operated at 87.6% of capacity in prime time, based 12,471 recorded hours of available prime time and 10,921 hours of use. When all ice surfaces are considered, the capacity figure for that season was 87.1%. At a 95% utilization target, the surplus would be reduced to **1.58 ice surfaces**. If city-owned arenas were open for all of the *officially* defined prime time hours and 95% utilization was the target, the surplus would be **2.2 ice surfaces**.

Therefore, depending on the definition of prime time (or level of service provided) and factoring in a utilization target of 95%, there are currently between 1.6 and 2.2 surplus ice surfaces in the City of Oshawa to meet current needs.

4.2 Requirement for Ice Surfaces to Meet Future Demand

Most of Section 3 was devoted to the analysis of the future demand for ice surfaces in Oshawa. It was reported that although the City is expected to grow in population by between 1% and 1.4% per year over the next twenty years, the principle age group that utilizes arenas is not expected to increase in number very much during that period. The 0-19 age group is projected to decline by around 500 by 2021 and then increase in number, but only by around 1,000 by 2026 - as the Echo generation begins to have children. During that period, the young and middle age adult population (age 20-54) is projected to increase by around 6,000, assuming an average annual growth rate for the City of 1.4%. If the growth rate is less, growth in the younger age groups

will be slower. Far fewer adults per thousand participate in team sports, and those that do, participate less frequently than children and youth.

It was also discussed that an increasingly diverse ethno-cultural population that, in Oshawa, could be two or two and half times the current size by 2031, will not likely be as interested in and able to participate in ice sports as today's population.

Increasing interest in other winter indoor sports could draw participants away from hockey, figure skating and Ringette.

Consultation with user groups provided varied opinion about growth in each of their sports in the immediate future. While most were optimistic about some growth in the next year or so, only NASC Hockey predicted significant growth which can only be achieved by drawing from other child and youth hockey organizations in Oshawa and/or by attracting a larger share of the declining age segment that they all serve.

Interest in leisure skating is expected to increase, influenced mostly by the aging Baby Boom generation.

Therefore, it is concluded that the likelihood of much growth in demand for arenas over the next ten to fifteen years is low, unless unforeseen circumstances accelerate growth in demand beyond what is anticipated. Growth in demand will likely increase from adults, but demand from children and especially youth could continue to decline. The larger number of adults may not compensate for the declining numbers of youth participants who utilize more hours of ice time per person than adults. Growth in demand will begin with younger participants by around 2021.

Update the Age-Specific Population Projections

When available, the 2011 census data should be carefully studied and the age-specific population projections should be updated, based in part on that new benchmark. *If the new projections are significantly different from those prepared in 2004, adjustments in demand projections for arenas will have to be made.*

However, some allowance should be provided for the potential for future growth in demand for arenas.

Allowing for 5% growth in demand for prime ice time, between 8.7 and 9.4 ice surfaces would be required, depending on how prime time is defined. Based on the current supply of the equivalent of 10.5 publicly-available ice surfaces, that would equate to a surplus of between 1.1 and 1.8 ice surfaces.

Allowing for 10% growth in demand for prime ice time, between 9.1 and 9.8 ice surfaces would be required, depending on how prime time is defined. Based on current supply of the equivalent of 10.5 publicly-available ice surfaces, that would equate to a surplus of between 0.7 and 1.4 ice surfaces.

Therefore, based on a utilization target of 95% and a rate of growth in demand for prime ice time of between 5% and 10%, there would be a surplus of between 0.7 and 1.8 ice surfaces to meet *future* needs, depending on the definition of prime time or level of service provided.

Agreement for Community Access to the Campus Ice Centre

In looking to the future, it must be kept in mind that the current agreement for community access to the Campus Ice Centre expires in 2025. There is no guarantee that the current agreement for access to the equivalent of 1.5 ice surfaces in prime time will continue at that time. If more prime time is required for varsity sports, less time will be made available for community use.

The following are two broad strategies and implications for reducing the supply of ice surfaces in Oshawa in the near future.

4.3 Scenario One: Reduce the Supply by One Ice Surface

Scenario One proposes that one ice surface be removed from the inventory in the immediate future.

Given the amount of excess prime time, the impact on **current use** would be manageable. The prime time currently allocated to one ice surface can easily be replaced by:

- Utilizing unallocated prime ice time at other facilities.
- Expanding the hours of operation on weekends at some facilities, if necessary.
- Reducing some of the prime time allocated to City programming (e.g., leisure skate).
- Reducing some of the adult rentals in prime time (e.g., shinny hockey).
- Reducing the number of prime time hours sold to unaffiliated Oshawa customers and out-of-town clients.

Affiliated groups would be able to receive all of their entitled hours and any additional hours that they desire, although some of the hours would be at less than desirable times. After adjustments, some surplus hours will remain, depending on how much additional prime time is made available by increasing hours of operation, and how many extra hours are sold to affiliated groups and how many hours are sold to other clients. It would be the intention to first utilize the ice time at the eight ice pads operated by the City, which will allow the City to maintain most of the ice rental revenues. The majority of tournament replacement ice would continue to be found at GMC.

A supply of the equivalent of 9.5 publicly-available ice surfaces (one less than is currently available) would accommodate **growth in demand** of up to around 5%, but scheduling flexibility would be further reduced and more undesirable hours would have to be taken. However, if growth in demand reaches 10%, there could be a shortage if one ice surface is removed, since the equivalent of between 9.1 and 9.8 publicly-available ice surfaces would be required, depending on how prime time is defined and the corresponding level of service provided.

4.4 Scenario Two: Reduce the Supply by Two Ice Surfaces

Scenario Two proposes that two ice surfaces be removed from the inventory in the immediate future.

Reducing the supply of two surfaces will have the following impacts:

- A significant adjustment will be required to the scheduling for ice organizations via the allocation policy, including affiliated users being required to take what is currently considered to be 'unpopular' hours.
- There will be almost no capacity to replace hours due to tournaments and other uses, and unforeseen situations - since ice scheduling will become very tight.
- There will be some corresponding revenue loss from displaced ice and floor rentals and programs.
- There will be little to no capacity to accommodate future growth in demand from Oshawa groups, depending on the amount of growth.

Based on the weekly pattern of scheduling and use in the 2010/11 regular season, in order to accommodate the removal of the two ice surfaces at Harman Park Arena, it would be necessary to replace 94 prime time hours/week. Those hours represent affiliated client ice needs and do not include any adult rentals or leisure skate times as it is deemed not necessary to replace those hours.

The following steps would be taken to address the deficit:

- All available surplus prime time ice at city-owned facilities and at CIC and GMC (73 hours/week in the 2010/11 season) would have to be used, including undesirable 4:30 and 5:00 pm weekday times, and early morning and late evening weekend times. That would still leave a deficit of 21 prime time hours/week.
- Available prime time hours at city-owned, CIC and GMC facilities would have to be increased by opening up a little earlier and closing a little later on weekends. A modest increase of hours would yield an additional 8 hours/week and reduce the deficit to 13.0 hours.

The remaining deficit of 13 prime time hours could be found through a combination of the following:

- An additional 8 hours of rental time could be freed up by cancelling all public skate times at Donevan and Children's arenas, leaving the Legends Centre as the only facility offering the leisure skate program (although demand is expected to increase for leisure skating from Baby Boom adults).
- An additional 7 hours of rental time could be freed up by not allowing non-affiliated adult hockey rentals during prime time hours at other city facilities (although demand may increase from this age segment as the Echo generation continues to age into their 30s and 40s).
- An additional 18 hours/week of prime time could be made available on weekends by opening up at 6 a.m. and staying open on all ice pads until 11 p.m.
- Cancellation of some or all city programs would free up as many as 36 prime time hours.

Appendix B: Oshawa Ice User and City Program Data, 2006-2010

Insert one page chart

Appendix C: Ice Allocation Matrix, Oshawa Arenas, 2010/11

Insert 2 page chart

Appendix C: Anticipated Changing Ethno-Cultural Profile of the Oshawa Population

Oshawa has a rich ethno-cultural composition. In 2006, 10.2% of the Oshawa Census Metropolitan Area (which comprises Oshawa, Clarington and Whitby) represented a visible minority, with Black leading at 3.8%, followed by South Asian at 1.8% and Chinese at 1.2%. Although the national average for 'visible minorities' is higher at 20.4%, the 2006 foreign-born population of the Oshawa CMA represented 16.3% of the total population and was distributed as follows: Europe (9.6%), the Americas (3.5%), Asia (2.6%) and Africa (0.6%).

By 2031, it is predicted that the visible minority population in the Oshawa CMA will be in range of 20-27% (an increase of 100-160%). And based on Statistics Canada projections, the top ten visible minority groups will likely be (in ranked order):

- | | |
|---------------------------------------|---|
| <input type="checkbox"/> South Asian, | <input type="checkbox"/> Latin American, |
| <input type="checkbox"/> Chinese, | <input type="checkbox"/> West Asian, |
| <input type="checkbox"/> Black, | <input type="checkbox"/> Southeast Asian, |
| <input type="checkbox"/> Filipino, | <input type="checkbox"/> Korean, and |
| <input type="checkbox"/> Arab, | <input type="checkbox"/> Japanese. |

Based on *continent of birth* and *place of residence*, the foreign-born population is predicted to represent 26.5% of the total national population in 2031 (compared to 19.8% in 2006). In 2031 it is predicted that nationally, the foreign-born population will be from:

- Asia (55.4%),
- Europe (20.5%),
- the Americas (13.9%),
- Africa (9.5%), and
- Oceania and others (0.8%).

The Statistics Canada study is titled 'Projections of the Diversity of the Canadian Population, 2006-2031' (March, 2010).