

**HRM
2001 Arena Capacity Study
Update**

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Prepared by

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Executive Summary

- The Update mirrors the 2001 Study and is based on Minor Hockey Areas as Minor Hockey is the single largest organized user of ice time in HRM. Data updated includes population, demographics, growth projections and minor sport registrations.
- Minor Hockey's Market Capture Rate (percentage of children ages 5 – 14 playing) increased in all areas of HRM between 2000/01 and 2007/08. 47% of the increase was due to rapidly increasing participation by girls.
- Primary Target Market Population for minor sport (ages 5 – 14) decreased in all areas of HRM except TASA (Timberlea Amateur Sports Association) between the 2001 and 2006 Census.
- Total number of children registered in Minor Hockey increased in all areas except Sackville between 2000/01 and 2007/08. Ringette registrations also increased while Figure Skating decreased.
- The number and percentage of children in the 0 – 4 age group (indication of future demand) decreased in all areas between 2001 and 2006, however individual communities showed increases. These included: Hammonds Plains (115), Clayton Park(85), Sackville North (60) and Dartmouth South (44), all of which have experienced subdivision development.
- The Halifax Regional School Board has undertaken a detailed review of demographics as part of the Imagine Our Schools planning process. While the overall population in HRM is projected to increase 32,658 by 2021, the population of children is projected to decrease by 11,715. Despite projected developments at Russell Lake and Morris Lake, 59% of this decline (6,910) is attributed to the Eastern Central Planning Area (Dartmouth, Eastern Passage, Cole Harbour and the Prestons).
- Population growth projections and historical use patterns from similar developments indicate that the projected developments in Kearney Lake North, Bedford South, Bedford West and the nearby area of Clayton Park, totaling close to 31,000, should generate significant demand for ice activities, which, coupled with existing demand, support the original recommendation of Bedford for additional ice surface development. Of the potential sites currently under consideration for ice surface development, the Bedford West site on Hammonds Plains near the 102 Highway is the closest to the majority of these population areas.

1.0 Introduction

The 2001 Arena Capacity Study identified Bedford as a high priority location for future ice surface development. This update was commissioned to determine if any significant factors had arisen in the last eight years that would alter this recommendation.

2.0 Methodology

The update reviewed changes in ice surface supply, minor sport registrations, ice demand, demographics and projected population growth. No research was conducted directly with individual user groups, although provincial minor sport organizations were contacted. The original study used Minor Hockey areas as the basis for assessing demand/supply issues since Minor Hockey has traditionally been the single largest organized user of ice time. The update followed the same protocol. The updated information is presented in Tables that in most cases correspond to the original study and have been numbered accordingly with R indicating revised information. Additional information is provided in supplemental Tables designated S.

The data upon which this update is based should be viewed as having varying degrees of reliability. Community Counts/Canada Census data and Minor Sport registrations would be considered the most reliable as they are actual results, while growth projections and demographic forecasts would be relatively less reliable.

3.0 Findings

3.1 Ice Surface Supply

Three significant events have occurred since 2001. As recommended in the 2001 Study, a second ice surface opened at the St. Margaret's Centre in the Fall of 2005. However the ice surface at the Akerley NSCC closed in the spring of 2007. This effectively reduced the number of ice surfaces to the 2001 level of 21. A review of the overall ice supply conducted in 2006/07 by HRM staff indicated that there were a total of 80.5 unused hours in Prime Time, the majority of which were between 10:00 PM and Midnight. When Akerley closed, HRM moved all adult rentals in the HRM operated arenas into late evening hours in an effort to accommodate the needs of Minor Sport.

An ice surface is currently under construction on the Bedford Common (Rocky Lake) Once in operation this facility will bring the ice supply back up to the minimum level recommended in the 2001 Study. However it is unlikely that it will be able to address the additional current ice demand identified in the Community Facility Master Plan of 2008 or potential future ice demand from proposed developments.

3.2 Minor Sport

3.2.1 Minor Hockey

Total registrations for the 8 Minor Hockey associations in HRM increased 13.4 % between 2000/01 and 2007/08. This was greater than the Province as a whole at 6.3%. Additional analysis indicated that female participation had increased 92.1% from 379 in 00/01 to 728 in 07/08. The province as a whole saw an increase of 63% in female participation from 1,372 to 2,237. However HRM still lags behind the province in terms of the % of females of total registrations at 11.7% as compared to the province with 13.3%.

According to Hockey Nova Scotia, the 11.7% increase in players in HRM is being accommodated in a static ice supply by reducing the amount of ice time per player and by decreasing the length of games. Although the number of girls playing hockey has increased, lack of access for females is still a major issue.

| Table 4 R Minor Hockey Registrations 2000 - 2008 | | | | | | | | | | | | | | |
|--|---------|--------|-------|-------|---------|--------|-------|-------|-----------|-------|-------|-------|-------|--------|
| | 2000/01 | | | | 2007/08 | | | | Var 08/00 | | | | | |
| | Total | M | F | % F | Total | M | F | % F | Total Act | % | M Act | % | F Act | % |
| Eastern Shore | 267 | 258 | 9 | 3.4% | 346 | 297 | 49 | 14.2% | 79 | 29.6% | 39 | 15.1% | 40 | 444.4% |
| Cole Harbour | 806 | 688 | 118 | 14.6% | 848 | 713 | 135 | 15.9% | 42 | 5.2% | 25 | 3.6% | 17 | 14.4% |
| Dart Whalers | 938 | 886 | 52 | 5.5% | 990 | 856 | 134 | 13.5% | 52 | 5.5% | -30 | -3.4% | 82 | 157.7% |
| Dartmouth Total | 2,011 | 1,832 | 179 | 8.9% | 2,184 | 1,866 | 318 | 14.6% | 173 | 8.6% | 34 | 1.9% | 139 | 77.7% |
| Sackville | 812 | 759 | 53 | 6.5% | 792 | 734 | 58 | 7.3% | -20 | -2.5% | -25 | -3.3% | 5 | 9.4% |
| Bedford & District | 809 | 780 | 29 | 3.6% | 887 | 798 | 89 | 10.0% | 78 | 9.6% | 18 | 2.3% | 60 | 206.9% |
| TASA | 531 | 520 | 11 | 2.1% | 854 | 781 | 73 | 8.5% | 323 | 60.8% | 261 | 50.2% | 62 | 563.6% |
| Halifax Hawks | 819 | 771 | 48 | 5.9% | 978 | 828 | 150 | 15.3% | 159 | 19.4% | 57 | 7.4% | 102 | 212.5% |
| Chebucto | 484 | 425 | 59 | 12.2% | 506 | 466 | 40 | 7.9% | 22 | 4.5% | 41 | 9.6% | -19 | -32.2% |
| Halifax Total | 3,455 | 3,255 | 200 | 5.8% | 4,017 | 3,607 | 410 | 10.2% | 562 | 16.3% | 352 | 10.8% | 210 | 105.0% |
| Total HRM | 5,466 | 5,087 | 379 | 6.9% | 6,201 | 5,473 | 728 | 11.7% | 735 | 13.4% | 386 | 7.6% | 349 | 92.1% |
| Province | 15,861 | 14,489 | 1,372 | 8.7% | 16,854 | 14,617 | 2,237 | 13.3% | 993 | 6.3% | 128 | 0.9% | 865 | 63.0% |

Akerley Impact

2006/07 registration information was compared with 2007/08 in an attempt to assess the impact of the closure of the Akerley rink. See Table 4S on the following page.

While total registrations decreased by 9, Males decreased by 68 and Females increased by 59. A similar trend (total registrations about the same with decreasing Males and increasing Females) appears in the Province as a whole.

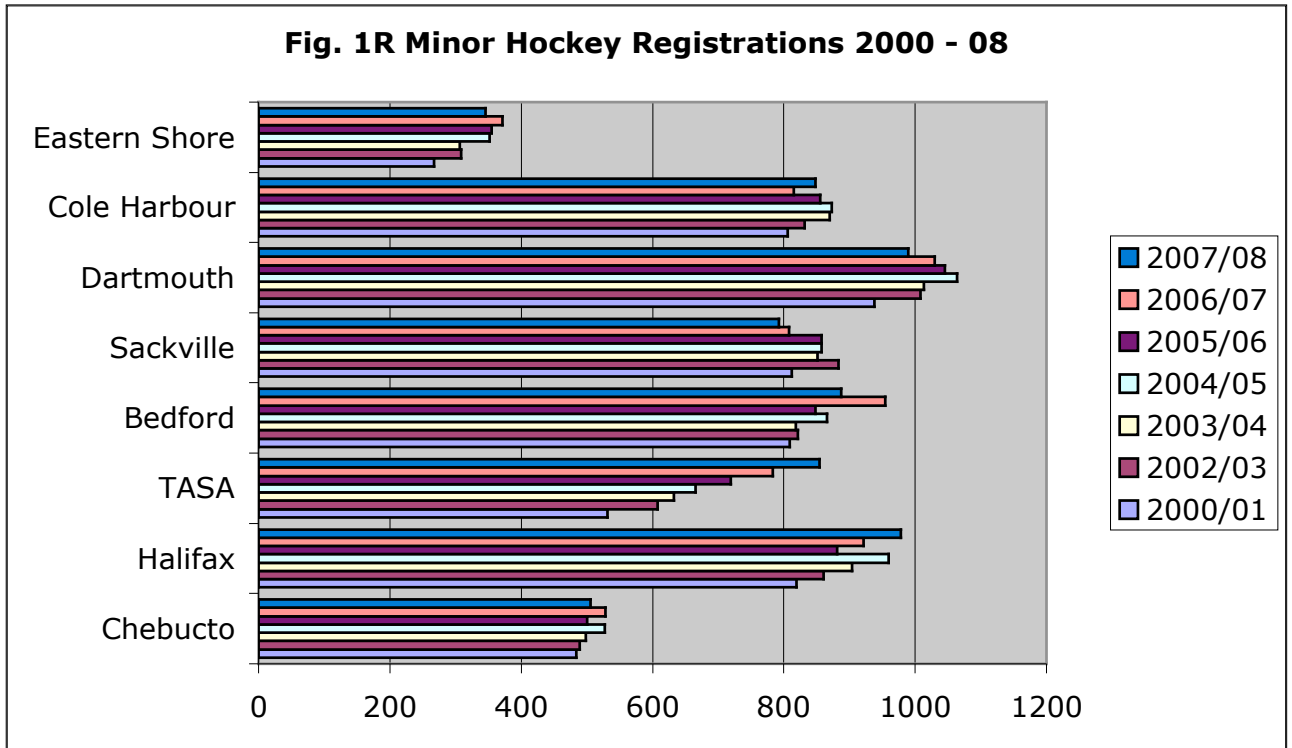
Of the 8 associations, 5 recorded losses while 3 gained. The increase of 71 for TASA could be attributed to the continuing development of the market as a result of the new ice surface in St. Margaret's and continued population increases, however the underlying reasons for increases in Halifax and Cole Harbour were not readily evident.

After Akerley closed, Bedford recorded the largest decrease with 67 fewer players. This appeared to be excessive given that a review of Akerley ice rentals indicated only 6 hours of rentals per week for that association, all or almost all of which were replaced in other facilities. A detailed review of Bedford registration information indicated that the majority of the decrease was in IP (Introductory Program) males. Decreases for the other associations appeared to be spread more evenly across the divisions. Registrations in Dartmouth, the area that would presumably have been most heavily impacted by the Akerley closure, decreased by 40 with 69 fewer males and 29 more females.

Since Minor Hockey registrations tend to fluctuate from year to year, no definite Akerley impact could be identified.

Fig. 1R on the following page provides a graphic comparison of registrations from 2000-08. The only Minor Hockey group that recorded consistent increases was TASA.

| Table 4S Minor Hockey Registrations Akerely Impact | | | | | | | | | | | | | | |
|---|---------|--------|-------|-------|---------|--------|-------|-------|-----------|-------|-----|-------|-------|--------|
| | 2006/07 | | | | 2007/08 | | | | Variance | | | | | |
| | Total | M | F | % F | Total | M | F | % F | Total Act | % Act | M | % | F Act | % |
| Eastern Shore | 371 | 295 | 76 | 20.5% | 346 | 297 | 49 | 14.2% | -25 | -6.7% | 2 | 0.7% | -27 | -35.5% |
| Cole Harbour | 815 | 695 | 120 | 14.7% | 848 | 713 | 135 | 15.9% | 33 | 4.0% | 18 | 2.6% | 15 | 12.5% |
| Dart Whalers | 1,030 | 925 | 105 | 10.2% | 990 | 856 | 134 | 13.5% | -40 | -3.9% | -69 | -7.5% | 29 | 27.6% |
| Dartmouth Total | 2,216 | 1,915 | 301 | 13.6% | 2,184 | 1,866 | 318 | 14.6% | -32 | -1.4% | -49 | -2.6% | 17 | 5.6% |
| Sackville | 808 | 750 | 58 | 7.2% | 792 | 734 | 58 | 7.3% | -16 | -2.0% | -16 | -2.1% | 0 | 0.0% |
| Bedford & District | 954 | 857 | 97 | 10.2% | 887 | 798 | 89 | 10.0% | -67 | -7.0% | -59 | -6.9% | -8 | -8.2% |
| TASA | 783 | 717 | 66 | 8.4% | 854 | 781 | 73 | 8.5% | 71 | 9.1% | 64 | 8.9% | 7 | 10.6% |
| Halifax Hawks | 921 | 808 | 113 | 12.3% | 978 | 828 | 150 | 15.3% | 57 | 6.2% | 20 | 2.5% | 37 | 32.7% |
| Chebucto | 528 | 494 | 34 | 6.4% | 506 | 466 | 40 | 7.9% | -22 | -4.2% | -28 | -5.7% | 6 | 17.6% |
| Halifax Total | 3,994 | 3,626 | 368 | 9.2% | 4,017 | 3,607 | 410 | 10.2% | 23 | 0.6% | -19 | -0.5% | 42 | 11.4% |
| Total HRM | 6,210 | 5,541 | 669 | 10.8% | 6,201 | 5,473 | 728 | 11.7% | -9 | -0.1% | -68 | -1.2% | 59 | 8.8% |
| Province | 16,849 | 14,685 | 2,164 | 12.8% | 16,854 | 14,617 | 2,237 | 13.3% | 5 | 0.0% | -68 | -0.5% | 73 | 3.4% |



3.2.2 Figure Skating

Figure Skating and Ringette registration information is contained in Table 5R.

Figure Skating registration for the Province as a whole declined by 14% between 2000/01 and 2007/08. About 39% of the total for the Province was based in HRM.

A severe lack of ice was the primary factor influencing Figure Skating participation according to the Skate Canada Nova Scotia.

3.2.3 Ringette

Ringette registrations have increased by 6.8% between 2000/01 and 2007/08. Ringette is basically centered in HRM and lack of ice time is a significant limiting factor in the growth and development of the sport. Some current participants travel as far as Oxford to access ice and teams are being forced to share ice time with as many as three on ice at the same time for practices. An officials training session has been delayed indefinitely due to a lack of ice.

| Table 5R Figure Skating and Ringette Registrations | | | | | | | |
|--|-------|-------|---------|-------|------------|-----------|-------|
| | 96/97 | 99/00 | 2007/08 | | HRM | Var 00/08 | |
| Figure Skating | | | Total | HRM | % of total | actual | % |
| CanSkaters | 3,791 | 3,549 | 2,858 | 1,121 | 39.2% | (691) | -19% |
| CanPower Skaters | 14 | 15 | 209 | 120 | 57.4% | 194 | 1293% |
| Test Skaters | 587 | 720 | | | | (720) | -100% |
| Star Skate | | | 632 | 205 | 32.4% | 632 | |
| Competitive Skaters | 99 | 104 | 91 | 23 | 25.3% | (13) | -13% |
| Synchronized Skaters | 31 | 37 | 8 | 2 | 25.0% | (29) | -78% |
| Total Province | 4,522 | 4,425 | 3,798 | 1,471 | 38.7% | (627) | -14% |
| Ringette | 788 | 872 | 931 | | | 59 | 6.8% |

3.3 Catchment Demographics

The 2001 report used 1996 demographic information as the 2001 information was not available and no reliable projections were available.

2001 and 2006 information was used to update Tables 6 and 7 to provide a clearer picture of the basis for the 2001 demand levels and subsequent changes. The 1996 information used in the original report was based on Planning Areas and, as noted in the report, was not directly related to the Minor Hockey boundaries. Similarly the 2001 and 2006 information cannot be directly related to Minor Hockey boundaries although changes in tabulation methods provide a much better approximation. The area with the greatest potential variance is Bedford as the boundaries of the Minor Hockey association encompass about a third of the geographic population area of Hammonds Plains. With no real way to ascertain how much of the Hammonds Plains population falls within the Bedford and District Minor Hockey boundaries, the decision was made to include Hammonds Plains with TASA based on the geographic area.

3.3.1 Total Population

A review of total population for 2001 and 2006 indicated that three of the eight minor hockey areas exceeded the 3.5% increase in HRM as a whole while two recorded basically static populations. Those exceeding were Bedford, TASA and Eastern Shore. Relatively static areas were Sackville and Dartmouth. The remainder were close to the overall HRM result. Table 6R on the following page provides a detailed review of the gains and losses in each of the communities within the 8 areas.

Table 6R Total Population by Minor Hockey Area

Source: Community Counts/Canada Census

| | 2001 | 2006 | Variance Actual | 2006/01 % | Gain/Loss % of HRM Total |
|-----------------------|---------|---------|--------------------|--------------|--------------------------------|
| Eastern Shore | 23,820 | 24,959 | 1,139 | 4.8% | 9.0% |
| Chezzetcook | 3,760 | 4,044 | 284 | 7.6% | |
| Jeddore | 1,430 | 1,525 | 95 | 6.6% | |
| Lake Echo | 3,074 | 2,913 | (161) | -5.2% | |
| Lawrencetown | 4,977 | 5,385 | 408 | 8.2% | |
| Middle Mus | 2,099 | 2,175 | 76 | 3.6% | |
| Musquodoboit Harbour | 1,995 | 2,136 | 141 | 7.1% | |
| Porter's Lake | 2,634 | 2,956 | 322 | 12.2% | |
| Sheet Harbour | 1,752 | 1,684 | (68) | -3.9% | |
| Ship Harbour | 2,099 | 2,141 | 42 | 2.0% | |
| Cole Harbour District | 27,625 | 28,294 | 669 | 2.4% | 5.3% |
| Cole Harbour | 25,200 | 25,934 | 734 | 2.9% | |
| Preston | 2,425 | 2,360 | (65) | -2.7% | |
| Dartmouth Whalers | 76,472 | 76,352 | (120) | -0.2% | -1.0% |
| Dartmouth | 66,134 | 65,335 | (799) | -1.2% | |
| Dartmouth East | 25,081 | 22,240 | (2,841) | -11.3% | |
| Dartmouth N | 20,104 | 18,354 | (1,750) | -8.7% | |
| Dartmouth S | 20,949 | 24,741 | 3,792 | 18.1% | |
| Eastern Passage | 10,338 | 11,017 | 679 | 6.6% | |
| Sackville | 38,417 | 38,512 | 95 | 0.2% | 0.8% |
| Beaver Bank | 6,072 | 6,025 | (47) | -0.8% | |
| Sackville N | 4,060 | 4,985 | 925 | 22.8% | |
| Sackville S | 28,285 | 27,502 | (783) | -2.8% | |
| Bedford & District | 27,398 | 29,204 | 1,806 | 6.6% | 14.3% |
| Bedford | 15,954 | 16,589 | 635 | 4.0% | |
| Waverly/Fall R | 11,444 | 12,615 | 1,171 | 10.2% | |
| Fall River | 9,111 | 10,251 | 1,140 | 12.5% | |
| Waverly | 2,333 | 2,364 | 31 | 1.3% | |
| TASA | 36,454 | 41,328 | 4,874 | 13.4% | 38.7% |
| Hammonds Plains | 7,907 | 10,295 | 2,388 | 30.2% | |
| Hubbards | 2,055 | 2,096 | 41 | 2.0% | |
| Hackett's Cove | 1,651 | 1,686 | 35 | 2.1% | |
| Hatchet Lake | 2,864 | 2,877 | 13 | 0.5% | |
| Peggy's Cove | 698 | 679 | (19) | -2.7% | |
| Prospect | 3,218 | 3,169 | (49) | -1.5% | |
| St Margaret's Bay | 2,148 | 2,326 | 178 | 8.3% | |
| Tantallon | 6,696 | 8,062 | 1,366 | 20.4% | |
| Terrence Bay | 1,076 | 1,049 | (27) | -2.5% | |
| Timberlea | 8,141 | 9,089 | 948 | 11.6% | |
| Halifax Hawks | 99,556 | 102,833 | 3,277 | 3.3% | 26.0% |
| Clayton Park | 26,013 | 30,911 | 4,898 | 18.8% | |
| Fairview | 14,997 | 14,478 | (519) | -3.5% | |
| Halifax Chebucto | 19,062 | 18,509 | (553) | -2.9% | |
| Halifax Citadel | 19,400 | 19,114 | (286) | -1.5% | |
| Halifax Needham | 20,084 | 19,821 | (263) | -1.3% | |
| Chebucto | 26,064 | 26,920 | 856 | 3.3% | 6.8% |
| Armdale NW Arm | 9,018 | 9,773 | 755 | 8.4% | |
| Herring Cove | 2,738 | 2,790 | 52 | 1.9% | |
| Sambro | 3,722 | 3,775 | 53 | 1.4% | |
| Spryfield | 10,586 | 10,582 | (4) | 0.0% | |
| Total HRM | 355,806 | 368,402 | 12,596 | 3.5% | 100% |

3.3.2 Age Groups

Population by major age groups is provided in Table 7R for 2006 and in Table 7S for 2001. 2001 represents the situation as it existed when the original study was conducted. The 2006 information coupled with growth projections (see Section 3.4 page 12) can provide an indication of areas of future demand for ice services in HRM.

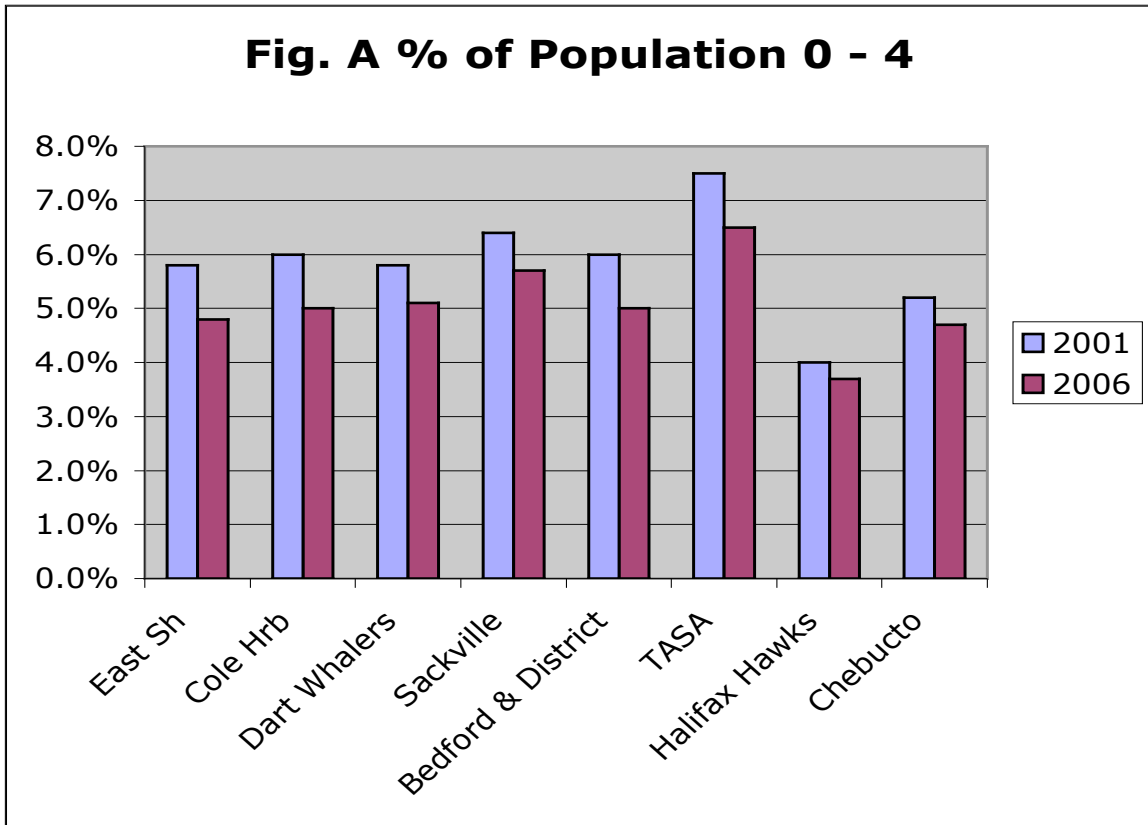
A comparison between 2001 and 2006 reflects a general aging of the population with all of the areas recording lower percentages of children in the 0 – 4 age group (Fig. A page 11). The area with the highest percentage of young children is still TASA at 6.5% although it lost a full percentage point since 2001.

| Table 7R Age Groups by Minor Hockey Area 2006 | | | | | | | | | |
|---|---------|----------|-----------|-----------|---------|--------|---------|----------|---------|
| Source: Community Counts/Census Canada | | | | | | | | | |
| Actual | East Sh | Cole Hrb | Dartmouth | Sackville | Bedford | TASA | Halifax | Chebucto | Total |
| 0 - 4 | 1,194 | 1,405 | 3,919 | 2,207 | 1,458 | 2,702 | 3,781 | 1,275 | 17,941 |
| 5 to 14 | 3,087 | 4,022 | 8,373 | 5,274 | 4,051 | 5,984 | 7,741 | 2,952 | 41,484 |
| 15 - 19 | 1,739 | 2,408 | 4,875 | 2,954 | 2,266 | 2,820 | 5,288 | 1,707 | 24,057 |
| 20 to 34 | 3,845 | 4,827 | 15,117 | 7,228 | 4,444 | 6,597 | 32,404 | 4,780 | 79,242 |
| 35 to 54 | 8,631 | 9,888 | 24,892 | 13,065 | 10,310 | 15,267 | 27,447 | 8,888 | 118,388 |
| 55- 69 | 4,363 | 4,327 | 11,627 | 6,055 | 4,613 | 5,803 | 14,488 | 4,427 | 55,703 |
| 70+ | 2,074 | 1,412 | 7,435 | 1,748 | 2,031 | 2,149 | 11,555 | 2,835 | 31,239 |
| Total | 24,933 | 28,289 | 76,238 | 38,531 | 29,173 | 41,322 | 102,704 | 26,864 | 368,054 |
| % | East Sh | Cole Hrb | Dartmouth | Sackville | Bedford | TASA | Halifax | Chebucto | Total |
| 0 - 4 | 4.8% | 5.0% | 5.1% | 5.7% | 5.0% | 6.5% | 3.7% | 4.7% | 4.9% |
| 5 to 14 | 12.4% | 14.2% | 11.0% | 13.7% | 13.9% | 14.5% | 7.5% | 11.0% | 11.3% |
| 15 - 19 | 7.0% | 8.5% | 6.4% | 7.7% | 7.8% | 6.8% | 5.1% | 6.4% | 6.5% |
| 20 to 34 | 15.4% | 17.1% | 19.8% | 18.8% | 15.2% | 16.0% | 31.6% | 17.8% | 21.5% |
| 35 to 54 | 34.6% | 35.0% | 32.7% | 33.9% | 35.3% | 36.9% | 26.7% | 33.1% | 32.2% |
| 55- 69 | 17.5% | 15.3% | 15.3% | 15.7% | 15.8% | 14.0% | 14.1% | 16.5% | 15.1% |
| 70+ | 8.3% | 5.0% | 9.8% | 4.5% | 7.0% | 5.2% | 11.3% | 10.6% | 8.5% |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Table 7S Age Groups by Minor Hockey Area 2001
 Source: Community Counts/Canada Census

| Actual | East Sh | Cole Hrb | Dartmouth | Sackville | Bedford | TASA | Halifax | Chebucto | Total |
|--------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|----------------|
| 0 - 4 | 1,383 | 1,671 | 4,424 | 2,458 | 1,655 | 2,718 | 4,020 | 1,406 | 19,735 |
| 5 to 14 | 3,466 | 4,532 | 10,048 | 6,043 | 4,184 | 5,537 | 8,335 | 3,339 | 45,484 |
| 15 - 19 | 1,705 | 2,326 | 4,738 | 2,891 | 2,099 | 2,128 | 5,154 | 1,665 | 22,706 |
| 20 to 34 | 3,887 | 4,949 | 15,940 | 7,676 | 4,734 | 6,861 | 31,039 | 4,899 | 79,985 |
| 35 to 54 | 8,362 | 10,121 | 25,357 | 13,516 | 10,121 | 13,284 | 27,652 | 8,613 | 117,026 |
| 55- 69 | 3,231 | 3,091 | 9,742 | 4,356 | 3,271 | 4,079 | 12,086 | 3,509 | 43,365 |
| 70+ | 1,795 | 969 | 6,317 | 1,374 | 1,492 | 1,774 | 11,143 | 2,533 | 27,397 |
| Total | 23,829 | 27,659 | 76,566 | 38,314 | 27,556 | 36,381 | 99,429 | 25,964 | 355,698 |

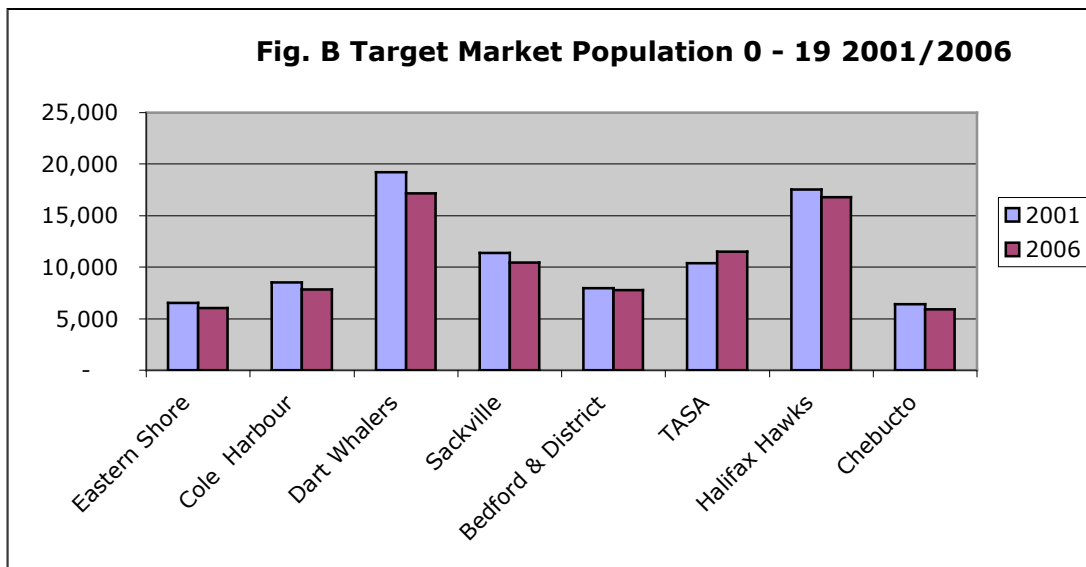
| % | East Sh | Cole Hrb | Dartmouth | Sackville | Bedford | TASA | Halifax | Chebucto | Total |
|--------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|--------------|---------------|
| 0 - 4 | 5.8% | 6.0% | 5.8% | 6.4% | 6.0% | 7.5% | 4.0% | 5.2% | 5.5% |
| 5 to 14 | 14.5% | 16.4% | 13.1% | 15.8% | 15.2% | 15.2% | 8.4% | 12.4% | 12.8% |
| 15 - 19 | 7.2% | 8.4% | 6.2% | 7.5% | 7.6% | 5.8% | 5.2% | 6.2% | 6.4% |
| 20 to 34 | 16.3% | 17.9% | 20.8% | 20.0% | 17.2% | 18.9% | 31.2% | 18.2% | 22.5% |
| 35 to 54 | 35.1% | 36.6% | 33.1% | 35.3% | 36.7% | 36.5% | 27.8% | 32.1% | 32.9% |
| 55- 69 | 13.6% | 11.2% | 12.7% | 11.4% | 11.9% | 11.2% | 12.2% | 13.1% | 12.2% |
| 70+ | 7.5% | 3.5% | 8.3% | 3.6% | 5.4% | 4.9% | 11.2% | 9.4% | 7.7% |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 96.6% | 100.0% |



3.3.3 Target Market Population By Age Groups

Table 7 S2 on the following page provides a comparison of gains and losses between 2001 and 2006 for the target market age groups for each of the communities within the 8 areas. HRM as a whole lost 4,443 children. The only area with a net gain was TASA with 1,123. The area with the greatest losses was Dartmouth Whalers with 2,043 fewer children in 2006 as compared with 2001.

Fig. B provides a graphic comparison of the target market populations 0 –19 years of age.



**Table 7S2 Target Market Age Groups by Minor Hockey Area
Actual Var 2006/01**

Source: Community Counts/Census Canada

| | 0 - 4 | 5 to 14 | 15 - 19 | Total |
|-------------------------------|----------------|----------------|--------------|----------------|
| <u>Eastern Shore</u> | <u>(189)</u> | <u>(379)</u> | <u>34</u> | <u>(534)</u> |
| Chezzetcook | (20) | (52) | 12 | (60) |
| Jeddore | (22) | (9) | (9) | (40) |
| Lake Echo | (53) | (82) | (73) | (208) |
| Lawrencetown | (5) | (52) | 2 | (55) |
| Middle Mus | 3 | (46) | 25 | (18) |
| Musquodoboit Harbour | (30) | (47) | (3) | (80) |
| Porter's Lake | (3) | (38) | 67 | 26 |
| Sheet Harbour | (28) | (35) | 4 | (59) |
| Ship Harbour | (31) | (18) | 9 | (40) |
| <u>Cole Harbour</u> | <u>(266)</u> | <u>(510)</u> | <u>82</u> | <u>(694)</u> |
| Cole Harbour | (224) | (431) | 78 | (577) |
| Preston | (42) | (79) | 4 | (117) |
| <u>Dartmouth Whalers</u> | <u>(505)</u> | <u>(1,675)</u> | <u>137</u> | <u>(2,043)</u> |
| <u>Dartmouth</u> | <u>(455)</u> | <u>(1,485)</u> | <u>(37)</u> | <u>(1,977)</u> |
| Dartmouth East | (306) | (777) | (109) | (1,192) |
| Dartmouth N | (193) | (584) | (147) | (924) |
| Dartmouth S | 44 | (124) | 219 | 139 |
| Eastern Passge | (50) | (190) | 174 | (66) |
| <u>Sackville</u> | <u>(251)</u> | <u>(769)</u> | <u>63</u> | <u>(957)</u> |
| Beaver Bank | (18) | (75) | 3 | (90) |
| Sackville N | 60 | 85 | 85 | 230 |
| Sackville S | (293) | (779) | (25) | (1,097) |
| <u>Bedford & District</u> | <u>(197)</u> | <u>(133)</u> | <u>167</u> | <u>(163)</u> |
| Bedford | (191) | (203) | 77 | (317) |
| Waverly/Fall R | (6) | 70 | 90 | 154 |
| Fall River | 3 | 62 | 86 | 151 |
| Waverly | (9) | 8 | 4 | 3 |
| <u>TASA</u> | <u>(16)</u> | <u>447</u> | <u>692</u> | <u>1,123</u> |
| Hammonds Plains | 115 | 502 | 215 | 832 |
| Hubbards | 19 | (38) | 27 | 8 |
| Hackett's Cove | (21) | (24) | 13 | (32) |
| Hatchet Lake | (52) | (42) | 85 | (9) |
| Peggy's Cove | (11) | (30) | (4) | (45) |
| Prospect | (33) | (108) | (15) | (156) |
| St Margaret's Bay | (2) | 27 | 4 | 29 |
| Tantallon | 14 | 208 | 174 | 396 |
| Terrence Bay | 2 | (8) | (5) | (11) |
| Timberlea | (47) | (40) | 198 | 111 |
| <u>Halifax Hawks</u> | <u>(239)</u> | <u>(594)</u> | <u>134</u> | <u>(699)</u> |
| Clayton Park | 85 | 296 | 318 | 699 |
| Fairview | (110) | (223) | (28) | (361) |
| Halifax Chebucto | (47) | (219) | (32) | (298) |
| Halifax Citadel | (58) | (208) | (61) | (327) |
| Halifax Needham | (109) | (240) | (63) | (412) |
| <u>Chebucto</u> | <u>(131)</u> | <u>(387)</u> | <u>42</u> | <u>(476)</u> |
| Armdale NW Arm | (4) | (26) | (32) | (62) |
| Herring Cove | (18) | (60) | 26 | (52) |
| Sambro | (2) | (83) | 18 | (67) |
| Spryfield | (107) | (218) | 30 | (295) |
| Total | (1,794) | (4,000) | 1,351 | (4,443) |

3.4 Population Projections

3.4.1 Population Growth

Overall population growth in HRM has exceeded the high projections contained in Table 8 of the original report for 2001 and 2006. High level projections used by HRM’s Planning Division for the Regional Plan exceed those in Table 8R.

| Table 8 R Projected Population HRM 1996 - 2021 | | | | |
|---|---------------------------|--|----------------------------|---------------|
| | Low Projection | Reference Medium Projection | High Projection | Actual |
| (Base) 1996 | 342,966 | 342,966 | 342,966 | 342,966 |
| 2001 | 353,886 | 356,452 | 358,256 | 359,183 |
| 2006 | 361,825 | 367,150 | 370,893 | 372,858 |
| 2011 | 367,266 | 375,497 | 381,297 | |
| 2016 | 370,934 | 382,170 | 380,106 | |
| 2021 | 373,035 | 387,371 | 397,483 | |

Source: Base Data: Statistics Canada, Census of Canada 1996, 2001, 2006.
Projections: Calculated by the Canada Mortgage and Housing Corporation’s Potential Housing Demand Model, Version 1.2

HRM’s Planning Division has identified and assessed potential population growth areas. In terms of the Minor Hockey boundaries, the area with the largest potential growth with the highest likelihood of proceeding within the next fifteen to twenty years is Bedford, specifically Kearney Lake North, Bedford South and Bedford West. The nearby area of Clayton Park is also expected to grow significantly. Total projected increase in population is in the order of 31,000 in diversified mix use development.

The next largest potential growth would be in Dartmouth at Russell Lake and Morris Lake with a total of approximately 12,000 .

3.4.2 Population Demographics

The Halifax Regional School Board has undertaken a detailed review of demographics as part of the Imagine Our Schools planning process. To date only

the major urban areas have been completed as part of Phase 1. The projections are based on School Families and as such do not correspond to the Minor Hockey boundaries however they do give an indication of trends within an overall area.

The following is an excerpt from the Phase 1 Background Report that explains the methodology used to develop the projections.

“ Projection Methodology

Separate age cohort and enrolment projections have been calculated for both Halifax Regional Municipality (HRM) and the two planning areas. The age cohort projection is used to estimate the future population, which provides a trend in the school aged children population at a larger geographic grouping, such as a planning area. The enrolment projection is used to generate a grade-by-grade projection for each program offered at a school. The key components of each methodology are discussed below.

Age Cohort

The Cohort-Survival Method combined with a technique for deriving migration estimates known as the Residual Method was utilized to estimate populations for HRM and the two planning areas. Both methods are well-recognized techniques for generating accurate and detailed population projections.

The Cohort-Survival Method uses historical Census data and projects future population based on assumptions about births, deaths and net migration. This method was used by well-known author, David Foot, for his best-selling book on Canadian demographic trends, *Boom, Bust and Echo*.

The Residual Method is also well recognized if not as widely applied. It involves the calculation of population between two points in time for which population data is available using the Cohort-Survival Method. Given that the Cohort-Survival Method provides a reliable estimate of population resulting from the influences of fertility and mortality, the comparison of a population projection generated by this method with actual Census counts can be assumed to reveal the influence of migration.

Enrolment

Enrolment projections are based upon the Cohort-Survival Method, which uses historical grade by grade enrolment to estimate a grade by grade projection for each program offered at a school. This method uses trends to identify the progression of students from one grade to the next higher grade. Other data sources, including new housing developments and feeder school analysis, are used to supplement the Cohort-Survival Method projections.”

The areas completed to date are Eastern Central Halifax (Dartmouth, Eastern Passage, Prestons, Cole Harbour) and Peninsular Halifax. Table 8 S provides a comparison of the actual school enrolment in 2005/06 with projected enrolment in 2017/18. The total school enrolment in Eastern Central is projected to decline 23%

(4,090) while that in Peninsular Halifax is projected to decline 8% (425). Within the Eastern Central area, the family of schools with the greatest decline is Auburn Drive High at 32% (1,389).

| | | Actual | Projected | Variance | |
|----------------------------|---------|---------|-----------|----------|---------|
| | Schools | 2005/06 | 2017/2018 | % | Actual |
| Auburn Drive High | 9 | 4,304 | 2,915 | -32% | (1,389) |
| Dartmouth High | 11 | 4,246 | 3,214 | -24% | (1,032) |
| Cole Harbour District High | 12 | 4,583 | 3,491 | -24% | (1,092) |
| Prince Andrew | 12 | 4,494 | 3,917 | -13% | (577) |
| Total East Central | 44 | 17,627 | 13,537 | -23% | (4,090) |
| Pen Halifax - Citadel High | 17 | 5,108 | 4,683 | -8% | (425) |

The report also includes age group information for HRM as a whole and for the two Planning Areas completed to date. Table 8S2 on the following page compares projected age groups to 2021 with the 2006 actual. While the overall population in HRM is projected to increase by 32,658, the population of children is projected to decrease by 11,715, 6,910 (59%) of which will be attributed to the Eastern Central Planning Area. The decreases in the 0 – 19 age groups have been partially offset by projected development.

Table 8S2 Population Age Group Projections

Source: Imagine Our Schools

Eastern Central Halifax Regional Planning Area

Dartmouth Cole Harbour

| | 2006 | 2011 | 2016 | 2021 | Variance 2021/2006 % | Net |
|-----------|---------|---------|---------|---------|----------------------------|---------|
| 0 to 4 | 6,005 | 5,728 | 5,633 | 5,354 | -10.8% | (651) |
| 5 to 14 | 13,870 | 11,658 | 10,800 | 10,505 | -24.3% | (3,365) |
| 15 to 19 | 8,000 | 7,174 | 5,658 | 5,106 | -36.2% | (2,894) |
| Total | 27,875 | 24,560 | 22,091 | 20,965 | -24.8% | (6,910) |
| Total Pop | 115,250 | 114,897 | 113,938 | 112,132 | -2.7% | (3,118) |

Peninsular Halifax Planning Area

| | 2006 | 2011 | 2016 | 2021 | 2021/2006 % | Net |
|-----------|--------|--------|--------|--------|----------------|-------|
| 0 to 4 | 2,150 | 2,378 | 2,307 | 2,387 | 11.0% | 237 |
| 5 to 14 | 4,500 | 4,000 | 4,078 | 4,233 | -5.9% | (267) |
| 15 to 19 | 3,410 | 3,171 | 2,788 | 2,526 | -25.9% | (884) |
| Total | 10,060 | 9,549 | 9,173 | 9,146 | -9.1% | (914) |
| Total Pop | 65,280 | 65,962 | 66,704 | 67,076 | 2.8% | 1,796 |

Halifax Regional Municipality

| | 2006 | 2011 | 2016 | 2021 | 2021/2006 % | Net |
|-----------|---------|---------|---------|---------|----------------|----------|
| 0 to 4 | 18,205 | 18,104 | 18,311 | 18,368 | 0.9% | 163 |
| 5 to 14 | 41,970 | 37,565 | 35,797 | 35,922 | -14.4% | (6,048) |
| 15 to 19 | 24,340 | 23,025 | 20,274 | 18,510 | -24.0% | (5,830) |
| Total | 84,515 | 78,694 | 74,382 | 72,800 | -13.9% | (11,715) |
| Total Pop | 372,675 | 385,029 | 396,289 | 405,333 | 8.8% | 32,658 |

3.5 Market Demand

A comparison of Minor Hockey Registrations with primary market population (ages 5 to 14) data between 2000/01 and 2007/08 (Table A on the following page) indicates that although the size of the market has decreased, the total number of children playing hockey has increased and therefore the percentage of children playing (capture rate) has increased. An analysis of male and female participation indicates that close to 50% of the increase was due to higher female participation.

All of the Minor Hockey Associations increased their market capture rates between 2000 and 2008. However any comparison of rates among the associations should be viewed with caution as there are some discrepancies between the population areas and the Minor Hockey boundaries that could skew the data. With some of the Bedford population allocated to TASA, the potential effect would be to increase the Bedford capture rate and decrease that of TASA. Their combined rate was 14% in 2000/01 and 17% in 2007/08.

The Dartmouth region continued to have a lower capture rate than the Halifax region but the difference in the two rates did not change significantly between the two time frames with Halifax capturing 1.5 percentage points more in 2000/01 and 1.3 percentage points more in 2007/08. However Halifax increased registrations by 16.3% while Dartmouth increased registrations by only 8.6%. This would be expected given that the target market in Halifax is not decreasing as fast as that in Dartmouth.

HRM as a whole continues to lag behind the Provincial participation rate at 14.9% as compared with 16.1% for the Province as a whole.

**Table A Minor Hockey Registrations/Population 5 - 14
Capture Rate**

| | 2000/01 | | | 2007/08 | | | Variance | | | |
|--------------------|---------|---------|-------|---------|---------|-------|---------------|-------|---------------|--------|
| | Reg | Pop | Rate | Reg | Pop | Rate | Reg Actual | % | Pop Actual | % |
| Eastern Shore | 267 | 3,466 | 7.7% | 346 | 3,087 | 11.2% | 79 | 29.6% | (379) | -10.9% |
| Cole Harbour | 806 | 4,532 | 17.8% | 848 | 4,022 | 21.1% | 42 | 5.2% | (510) | -11.3% |
| Dart Whalers | 938 | 10,048 | 9.3% | 990 | 8,373 | 11.8% | 52 | 5.5% | (1,675) | -16.7% |
| Dartmouth Total | 2,011 | 18,046 | 11.1% | 2,184 | 15,482 | 14.1% | 173 | 8.6% | (2,564) | -14.2% |
| Sackville | 812 | 6,043 | 13.4% | 792 | 5,274 | 15.0% | (20) | -2.5% | (769) | -12.7% |
| Bedford & District | 809 | 4,184 | 19.3% | 887 | 4,051 | 21.9% | 78 | 9.6% | (133) | -3.2% |
| TASA | 531 | 5,537 | 9.6% | 854 | 5,984 | 14.3% | 323 | 60.8% | 447 | 8.1% |
| Halifax Hawks | 819 | 8,335 | 9.8% | 978 | 7,741 | 12.6% | 159 | 19.4% | (594) | -7.1% |
| Chebucto | 484 | 3,339 | 14.5% | 506 | 2,952 | 17.1% | 22 | 4.5% | (387) | -11.6% |
| Halifax Total | 3,455 | 27,438 | 12.6% | 4,017 | 26,002 | 15.4% | 562 | 16.3% | (1,436) | -5.2% |
| Total HRM | 5,466 | 45,484 | 12.0% | 6,201 | 41,484 | 14.9% | 735 | 13.4% | (4,000) | -8.8% |
| Province | 15,861 | 117,565 | 13.5% | 16,854 | 104,395 | 16.1% | 993 | 6.3% | (13,170) | -11.2% |

4.0 Summary

In the eight years since the original study, progress on the recommendations has been mixed. Although an ice surface was added in St. Margaret's Bay that had a marked impact on the local area in terms of increased Minor Hockey participation, the loss of the Akerley rink effectively brought the ice supply back to 2001 levels.

Female participation in Minor Hockey has increased significantly although it has a long way to go to reach gender equity and a lack of access to ice time for female dominated sports of Ringette and Figure Skating remains a significant problem. Recreational skating was not examined in this update as information could not be gathered from a sufficient number of arenas in the available time.

Since the population in the target market age groups decreased between 2001 and 2006, growth in Minor Hockey registrations can be attributed to increased market penetration, about 50% of which can be attributed to increased female participation. In 2001 approximately 13.7% of 5 to 14 year olds participated in Minor Hockey in HRM while 14.9% participated in 2008. HRM's participation rate lags behind the Province as a whole at 14.3% in 2001 and 16.1% in 2008. An exploration of the demand for Adult Hockey was not part of this update.

In terms of population trends, a comparison of target market age group projections undertaken in the Imagine Our Schools planning process indicates that the number of children between the ages of 0 and 19 in HRM will decrease by 11,715 between 2006 and 2021, 59% of which will occur in the Eastern Central Planning Region (Dartmouth, Eastern Passage, Cole Harbour and the Prestons) despite projected developments at Russell Lake and Morris Lake. This, coupled with net losses in target market age groups which have already occurred in the area (Table 7S Page 11) tend to indicate that the market for arena services would be relatively lower in the Dartmouth, Cole Harbour and Eastern Shore Minor Hockey areas compared with TASA and Bedford which have high current percentages of children in the 0 – 4 age group (indicating future demand), and in the case of TASA, which has experienced net growth in the target market age groups between 2001 and 2006.

These factors coupled with HRM Planning Division projections for a population increase of approximately 31,000 in developments in Kearney Lake North, Bedford South, Bedford West and the nearby area of Clayton Park, indicate that the original recommendation of Bedford for additional ice surface development remains valid. Of the sites currently under consideration for ice surface development, the Bedford West site on Hammonds Plains near the 102 Highway is the closest to the majority of these population areas.