4.0 DEMOGRAPHIC ASSESSMENT, RECREATION PARTICIPATION, AND FACILITY UTILIZATION

The following is a synopsis of research and conclusions regarding key aspects of the study, including:

- ***Population & Development Characteristics*** **–** Population and demographic trends were evaluated for community characterization areas (CCA) within the City of Winnipeg, as well as suburban municipalities.

- ***Recreation, Leisure, and Library Trends*** **–** Discussion of evolving trends and participation in recreation and leisure, driven in part by changing demographics for Canada, Manitoba, and Winnipeg, with discussion of relevant trends in the U.S.

- ***Facility Utilization*** **–** Usage data for noted sports-related facilities, including arenas (city operated and community centre operated), soccer facilities, and indoor / outdoor pools, and wading pools was analyzed.

- ***Program Analysis*** **–** Program class and attendance trends for community centres, recreation centres, leisure centres, libraries, and related program-based facilities were assessed. As libraries provide additional non-program services, the library specific trends were discussed separately.

4.1 Population and Development Characteristics

The analysis approach explored population trends and implications for the City of Winnipeg, its 12 community characterization areas, and adjacent rural municipalities. The approach yielded several critical facts about the Winnipeg market that have specific implications for recreational service delivery:

- Between 1971 and 1991, the City of Winnipeg added a total of almost 80,000 residents, or about 4,000 residents per year. Since 1991, growth slowed, with the city adding only about 4,300 new residents.

- If Winnipeg continues to grow at the pace established over the past 30 years, a 2021 population of 696,000 residents is possible, driven by annual growth of about 0.5% per year.

Within the overall trend data, several age-group specific conclusions that have relevance to this study were noted:

- Age cohort analysis points to profound structural changes in Winnipeg. Through 2011, forecasts point to reduced populations in age groups between 5 and 14 and 35 to 44, offset by considerable growth in age groups between 15 and 24, and 45 to 69. The 45 to

69 baby boom generation, in particular, will be a driving force, accounting for the single largest share of growth through 2011, with increased leisure time and disposable income.

- Winnipeg supports a significant base of urban Aboriginal people, the largest percentage segment among urban markets in Canada. This market is projected to grow at a rate of about four times that of non-Aboriginal population, and has very different needs and requirements when compared to the aforementioned boomers.

Changes in the above age cohorts will impact demand for recreational facilities and programs, which is discussed below. Future population growth will not favour all areas of the city equally. Based on current information, following CCA specific population trends are noted the:

- **Group 1 –** Fort Gary, St. Boniface, and St. Vital are predicted to benefit from the majority of near term population growth in the city. For 2003, these CCA's captured almost 70% of new housing permits, and have considerable land available for new development.

- **Group 2 –** Seven Oaks, River East, Inkster, and Transcona are predicted to benefit to a lesser extent, due to the presence of established competitive rural municipalities to the northeast of Winnipeg.

- **Group 3 –** Core CCAs, including Downtown, Point Douglas, and River Heights, St. James Assiniboia, have already experienced growth and are largely built out. These established areas are expected to see growth through infill development, as well as generational changes.

Suburban rural municipalities add an additional 51,000 people to the Winnipeg CMA. Suburban markets generally consist of a younger population base that has on average a greater household income. Currently, these markets have full or partial access to Winnipeg recreational facilities, but do not bear a fair share of costs to operate and maintain facilities.

4.2 Recreational Trends

The assessment notes that the 21st century poses new challenges for adapting and designing sports and recreation facilities that will respond to constantly evolving community needs. This point is critical given that facility availability, quality, and location drive programming options and participation. The assessment notes several important points:

- The gradual aging of the public is reducing demand for traditional, higher intensity team sports (hockey, baseball, basketball, etc), and increasing demand for individual recreation, including golf, exercise walking, aerobics, yoga, and other fitness programs. This impending shift has obvious facility implications for Winnipeg.

- Increased competition for limited leisure hours, particularly for adults with children, offset by growth in the senior age markets, where more leisure time is available.

- Recreation agencies are also asked to provide services and programs to at risk populations. In Winnipeg, recent program initiatives have focused on Aboriginal groups, which are growing at a considerably faster rate than the city as a whole. Given that recreational participation and income levels tend to be closely linked (i.e. the more you make the more you participate), developing recreational programs for marginalized groups creates obvious challenges, both in identifying needs, and funding them.

- Within the overall shift toward individualized recreation, urban markets have become focal points for growth of socially oriented team sports, targeting the younger single professional (aged 21 to 34) segment of the market. These socially oriented leagues have tended to increase participation from a segment that has limited leisure time, but relevant disposable income.

- Recreation agencies are increasingly forming public-private partnerships with the private sector to achieve needed recreational goals. These cost sharing programs allow the public sector to increase the supply of facilities and programs, without bearing all of the associated risk and cost. Cities have focused partnerships on hospitals, schools, and universities, both of which are also looking more into recreational facilities as part of broader market enhancement strategies. Agencies are also looking at more leisure oriented recreational facilities, particularly waterparks, which have boosted attendance.

- In cases where permanent facilities are prohibitively expensive, recreation agencies are opting for mobile recreation programs, in some cases referred to as traveling community centres. For example, mobile skate parks have been developed in cities such as Winnipeg.

- In the U.S., recreation agencies are coming under increased pressure from private sector providers of recreation, such as health and tennis clubs and hospital wellness centres. The private sector has increasingly resorted to lawsuits and pressure to stop publicly supported recreation projects. In Winnipeg, the local YMCA is building a new recreation centre in close proximity to the St. James Centennial pool and fitness centre, which is also planning an expansion.

- There is increasing pressure for recreation officials to offer a broader range of programs, moving beyond sports camps and arts and crafts to encompass relevant cultural, natural, ecological programs. Recreation agencies are also trying to remove traditional stereotypes, i.e. “senior”, and focus on programs that are more geared to functional levels and abilities rather than ages.

- The recognition that, if properly developed, recreational facilities, parks and open space make substantial contributions to “quality of life” in a community, specifically enhancing property values. Recreation agencies are looking at ways to capture this incremental value to help fund operations and capital costs.

- A recognition that traditional single use facilities are becoming obsolete, and need to be replaced by more flexible inter-generational recreation complexes, which can cater to more diverse market segments, and generate greater operational economies of scale.

4.3 Facility Utilization Discussion

4.3.1 Arenas

City owned and operated arenas, community centre arenas, and private arenas in the city and suburbs were evaluated. The assessment found that, overall, the arenas are heavily used during peak times, with increased vacancy during non-peak periods. Sports such as hockey, ringette, open skating, and related programs are offered. Importantly, due to the style in which many of these facilities were built, they have difficulty supporting non-ice sports such as indoor soccer. Initial conclusions point to a relative balance of supply and demand for arenas, with current market populations per arena falling in the 15,000-person range, which is consistent with expectations in other Canadian markets, where the population per rink is in the order of 1:20,000 people.

4.3.2 Soccer Facilities

Market assessments highlighted a known fact, which is that there are not enough indoor soccer facilities in Winnipeg. The situation will worsen when the private Winter Club soccer facility closes in 2004. The lack of appropriate facilities has created serious capacity issues, reducing the number of games that can be played per week. Assessments point to the obvious need to develop additional soccer facilities, with the potential for up to 4 new regional multi-pitch multiplexes, according to the preliminary analysis. Partnerships with Provincial sports organizations and the private sector could help facilitate development or operational support of new facilities.

4.3.3 Outdoor Pools

The outdoor pools were evaluated in terms of locations and attendance, and several key concerns were noted. A serious fall off in attendance has occurred at outdoor pools since 2000, with a total decrease in excess of 100%. As well, the available pool sites are poorly distributed across the region, with a heavy concentration in areas east of the Red River. The outdoor pool segment was prioritized for further evaluation as the study proceeded, relating operating and maintenance cost implications with current utilization to identify sites which should be rationalized.

4.3.4 Wading Pools

The consultant team approach looked at market size per pool, as well as current attendance per pool. The assessment noted which facilities are performing above average, and which ones are performing below average. Assessments concluded that the current approach of using shallow depth wading pools, which need to be emptied every night and staffed, is creating operating cost burdens that could be offset if the city were to move toward a modern zero-depth spray pad concept, which will reduce operating costs and liability.

4.3.5 Indoor Pools

The indoor pool segment covers larger facilities such as Sargent Park and Pan Am, both of which offer considerable non-aquatic programs, as well as a number of smaller facilities. Research efforts noted relative differences in facility attendance and program offerings. Key conclusions include the notion that while Pan Am was built primarily as a competitive training facility and numerous other programs have tended to reduce the amount of time available for training. On a broader level, assessments noted a complete lack of leisure oriented aquatic centres (i.e. waterparks). In the U.S. and Canada, development of "water park" oriented leisure centres has led to considerable increases in pool attendance.

4.4 Programming Analysis

The delivery of recreational programming in Winnipeg was analyzed, looking at the number of programs and class offerings in key categories, which include preschool, child, youth, family, adult leisure, active living, French classes, and senior classes. The array of program and class offerings were evaluated with respect to the existing recreational facilities in Winnipeg that deliver programs. These facility types include:

- Community centres
- Leisure centres
- Recreation centres
- Senior centres
- Schools (joint use and other)
- Libraries

The program analysis, which included a comparison of program offerings in relation to market age group populations, yielded broader conclusions, as well as specific details regarding facilities that deliver programming.

4.4.1 Community Centres

Assessments noted considerable variability in utilization of community centres around the city. Assessments noted that:

- City wide, community centres support about 55% of total program-related space, but only about 28% of program classes. This distinction relates to the fact that community centres have traditionally catered to indoor and outdoor sports programs, rather than indoor leisure programming. Current analyses are focusing on the extent to which community centres are physically capable of supporting indoor leisure programming.

- Community centres that support arena functions appear to support significantly less non-rink programming. The larger multiplex community centre arenas, including Dakota and Gateway, support very little non-rink activity, and may need to be treated entirely as arenas.

- When faced with competition from leisure centres, libraries, and schools for provision of indoor leisure programming, community centres do not perform as well, which relates to a general lack of indoor program space to support this kind of programming.

- Research noted that community centres in more suburban CCA's such as Inkster, Seven Oaks, River East, and Transcona support more leisure programs compared to community centres in core CCA's such as Downtown, Point Douglas, and River Heights. This relates in part to apparent reduced access to other leisure and recreation facilities in these more suburban CCA's.

- Community centres have tended to focus on the pre-school, child, and youth markets, segments which, at the citywide level, are decreasing as a percentage of total population as baby boomers retire. Community centres appear poorly positioned to pursue the growing adult / senior segment of the market, due to inadequate facilities, and other factors.

The community centre assessment indicated a need to carefully evaluate specific facilities in terms of population served, physical capacity to support programming, and needed infrastructure costs.

4.4.2 Leisure / Recreation Centres

The assessment covered a broad array of facilities, beginning with the heavily used Fort Rouge Leisure Centre, St. John's Leisure Centre, East End Cultural Centre, St. James Cultural Centre, and the St. James Civic Centre. Assessments also noted a significant number of other "recreation centres" with minimal programming, such as the Turtle Island Recreation Centre and the Magnus Eliason Recreation Centre.

4.4.3 Schools

All local schools where programs are offered were evaluated, including facilities where joint use agreements are in place. The assessment found considerable variation in usage, with key facilities in certain CCA's being heavily used, such as J.H Bruns, Dalhousie, Kent Road, Whyte Ridge, Darwin, and others supporting considerable programming. The assessment noted that while these programs can be offered at schools with little direct cost burden to the city, the approach also generates operating inefficiencies, which may be leading to reduced program attendance. Usage of schools appears to increase in the more suburban CCA's such as Seven Oaks and Transcona, suggesting that other facilities are not available to meet existing needs.

4.4.4 Libraries

While the ASM library study suggested that Winnipeg's libraries are performing below average compared to other Canadian cities, the libraries offer and support a significant share of local programming, and appear more efficient in supporting programs, particularly when compared to community centres. The library system provides a considerable array of educational and adult leisure programming.

4.4.5 Other Facilities

The share of programming at senior centres and field houses was reviewed, and it was found that these facilities support little recurring scheduled programming.

4.4.6 Overall Facility Situation

In terms of citywide program delivery, Community Services directly controls about 15% of programming, supported by about 10% of space, primarily at leisure centres and recreation centres. Libraries support an additional 20% of space, which is used to support 40% of programming. Community Centres support up to 50% of program space, but offer about 28% of programs. Schools support about 10% of programs, with about 10% of space.

4.5 Attendance Comparisons

Community Services officials provided additional information regarding program attendance levels at local recreational facilities. The attendance estimates separated programs into registered and non-registered programs, broken down by facility and CCA. The analysis approach included the following steps:

1) Extraction of class and attendance factors by program type

2) Analysis and comparison of class and attendance factors to relevant benchmarks

3) Calculation of participation rates, based on a comparison of population with total program attendance by CCA.

For non-registered programs, the assessment covered about 300 total classes with almost 150,000 attendees, focused primarily on preschool, child and youth drop in programs. For registered programs, the assessment covered about 2,700 classes, with total attendance of about 32,000 people. In calculating total classes and attendance, recreation leadership programs were excluded. Importantly, as registered and non-registered programs track attendance differently, the associated attendance values cannot be added together. Key conclusions are as follows:

- Regarding registered programs, the strongest participation occurs in CCA's such as River Heights, St. James, and Point Douglas. Significantly lower participation in registered programs occurs in Inkster, Downtown, and Seven Oaks, and Transcona. ERA attributes the poor performance in Inkster, Seven Oaks, and Transcona to a lack of facilities to support registered programming. Downtown is a unique market, where non-registered programs predominate. Overall participation rates range from about 13% of the population down to about 1% of the population.

- Non-registered program attendance rates are much higher, ranging from more than 50% down to about 10% of population. Non-registered participation varies considerably by CCA, with Point Douglas, Downtown, and Inkster supporting considerable participation rates, offset by very low rates in River Heights and St. James. The high degree of non-registered participation in Point Douglas and Downtown possibly relates to the availability of greater programming for Aboriginal groups in these particular CCA's.

- When comparing participation and income levels, CCA's toward the lower end of the income scale (Downtown and Point Douglas) appear to have significantly more non-registered participation, which may relate to higher Aboriginal populations. Importantly, however, as income brackets increase, relationships with non-registered and registered program participation appear to break down, particularly in CCA's such as Inkster and Transcona, which have notable shares of non-registered programming but higher incomes.

- When comparing registered and non-registered program participation to median age factors, there is a logical correlation between age and participation. As non-registered programs are predominantly for pre-school, and youth programs, CCA's with lower median ages would be expected to have greater participation in non-registered programs. This trend is shown in CCA's such as Point Douglas and Downtown, which have the lowest median ages, and the most non-registered participation. Also, CCA's such as St. James and Fort Gary have the highest median ages and significantly reduced shares of non-registered attendance. Within the broader trend, two details were noted:

    - River Heights supports the largest participation rate in registered programs, due primarily to the presence of the Fort Rouge Leisure Centre, which ERA believes captures a share of demand for registered programs from other CCA's where comparable quality facilities are not available.

    - Registered program participation in Transcona, Inkster, and Seven Oaks does not appear to be consistent with related growth in median ages. This distinction is attributed to a lack of appropriate facilities in these CCA's to support registered programs.