



DRAFT

**Community Hub &
Recreation Project -
Previous Activity & Data
Analysis**

**Project Steering Committee
April 10, 2018**

YMCA Analysis – Context

Included within the YMCA's Development Services proposal, in support of the Project Steering Committee:

“The YMCA shall provide the Steering Committee with a comprehensive review of existing Municipal data and reports related to community health, recreation, and facilities. Findings of these existing reports and gaps in information/data shall be incorporated into and tested within a Community Needs Assessment/Market Study to better inform the findings of the Assessment and provide actionable steps the Municipality can consider in addressing community need.”



YMCA Community Development Services

Support of Community Hub and Recreation Project Steering Committee

Analysis of
Existing
Data/Reports

Identification
of Knowledge
Gaps

Development
of Preliminary
Pro-Forma

Consultant
Terms of
Reference



YMCA Analysis – Scope

The following reports, proposals, and plans were reviewed by the YMCA:

- Community Services Master Plan, 2009 (dma)
- Indoor Aquatic Facility Review, 2013 (dma)
- Community Input Survey Results Report, 2012 (SH-RALLY)
- SH Corporate Strategic Plan 2015-2019, 2016 (MDB Insight)
- SHRC Exeter and District Pool Options, 2017
- SH Recreation Projects A Path Forward, 2017
- SH Media Release – Recreation Projects, 2017
- Community Hub/Recreation Centre Feedback, 2017
- Final Report to Council – Where do we go from here?, 2017
- South Huron Vision, Mission, Guiding Principles and Core Values
- Staff Reports to Council 2017-2018



YMCA Analysis – Conclusions

1. Significant support for new recreational facilities has existed within SH dating back to 2004
2. The Municipality has prioritized the creation of new recreational facilities
3. Studies completed to date have focused on amenities and not program demand
4. Residents support, in a general sense, paying more to ensure the availability of new recreation facilities however no specific data on price point/sensitivity exists
5. Demographic data previously used is out of date
6. Indoor Aquatic facilities are consistently cited as the top desired recreation amenity



Community Services Master Plan excerpts - 2009

3.1 Existing arenas will serve the Municipality over the next ten years. Beyond this timeframe, arena needs should be reassessed.

4.42 The Municipality should investigate opportunities to expand programming in a number of key areas including active living, adult and older adult general interest, arts and cultural activities, outdoor recreation and the environment, and programming for youth.

- 86% of survey respondents – municipality needs to do more to meet resident needs for parks and recreation services
- 70.5% of respondents called for the municipality to provide more or better recreation facilities



Indoor Aquatic Facility Review excerpts - 2013

- Not a feasibility study with local input rather the identification of possible implications was based on comparable facilities in other Ontario communities including Municipal and YMCA facilities.
- Businesses require a highly skilled workforce that typically seeks a particular lifestyle... involves good schools, a safe living environment and, second only to education for families, good recreation and library services.
- Construction & Development Costs of \$9M 4 lane pool facility and \$12.9M 6 lane pool facility
- Identified required annual operating support of St. Mary's facility as \$438,510 and Hanover facility as \$464,780
- The study examined the benefits of YMCA/Municipal partnerships



SH RALLY Survey Results Report highlights - 2012

- Conducted an open public survey with 992 non-duplicated responses. While note a random sample survey the response rate is impressive.
- Indoor pool was the highest desired asset
- 72.2% female respondents
- 52% of respondents 30-49 years of age
- Both point to family participation – females are more influential in family recreation decision making
- 57% of respondents were Exeter residents
- The group proposed a feasibility study as the next step



SH Corporate Strategic Plan excerpts - 2016

- Amongst key themes of public feedback “lacks recreational facilities”
- In creation of vision themes better recreation centre/pool/double-pad arena was most commented
- Programs or services participants are willing to pay more for
 - Recreation and Leisure 60%
 - Recreation and cultural services 53%
 - Above were top two responses
- In key informant interviews; asked to identify challenges or weaknesses SH struggles with:
 - Demographics and Youth Retention
 - Support for Business Investment
 - Recreational Facilities and Programming
- Top identified priority for SH – New Recreation Facilities



SH Corporate Strategic Plan excerpts - 2016

- Strategic vision goals:
 - Establishing new or upgraded recreation facilities
- 7.2.1 Strategic Objective: Improved Recreation and Community Wellbeing
- Demographic data contained within the plan is now dated and should be updated with 2016 Census data



YMCA Gap Analysis

- Identify support for specific recreation, leisure, and health activities/programs
- Activity participation should drive amenity selection/design and no further questions regarding general support for new facilities or an indoor pool are required
- Identify user pay willingness with specific price point/sensitivity analysis
- Evaluate results of random sample survey against current community demographic information
- Assess participation intentions/trends within existing community recreation, leisure, and health activities/programs
- Test resident acceptance of a municipal and a municipal/YMCA partnered operating model



Next Steps

- Confirm Gaps identified and/or identify additional knowledge gaps which the Project Steering Committee wishes explored
- Complete the Gap Analysis through inclusion of existing community programs participation statistics and projections
- Develop terms of reference for the execution of a Community Needs Assessment/Market Study for Recreational Programming based on the identified gaps in knowledge and standard areas of inquiry necessary to develop operating pro-forma and cases for financial support (government and donor)
- Develop a list of preferred consultants for invitation to a Request for Proposal process



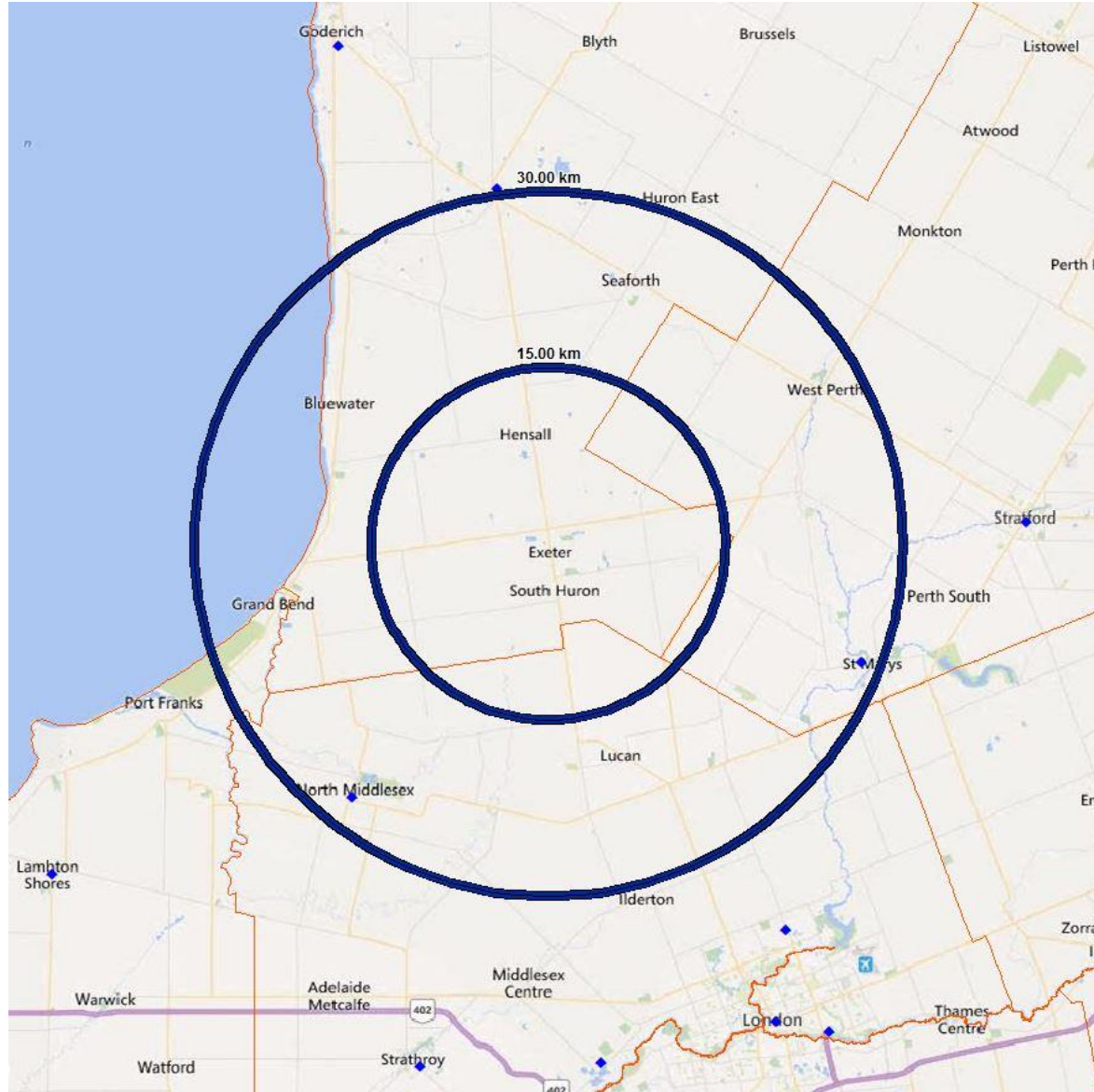
Community Needs Assessment/Market Study

Three distinct elements:

- Resident Survey – selected consultant
- Consultations/Focus Groups - YMCA
- Demographic Analysis – YMCA & Consultant



Proposed South Huron Market Area #1



Primary Market Area
15 km radius

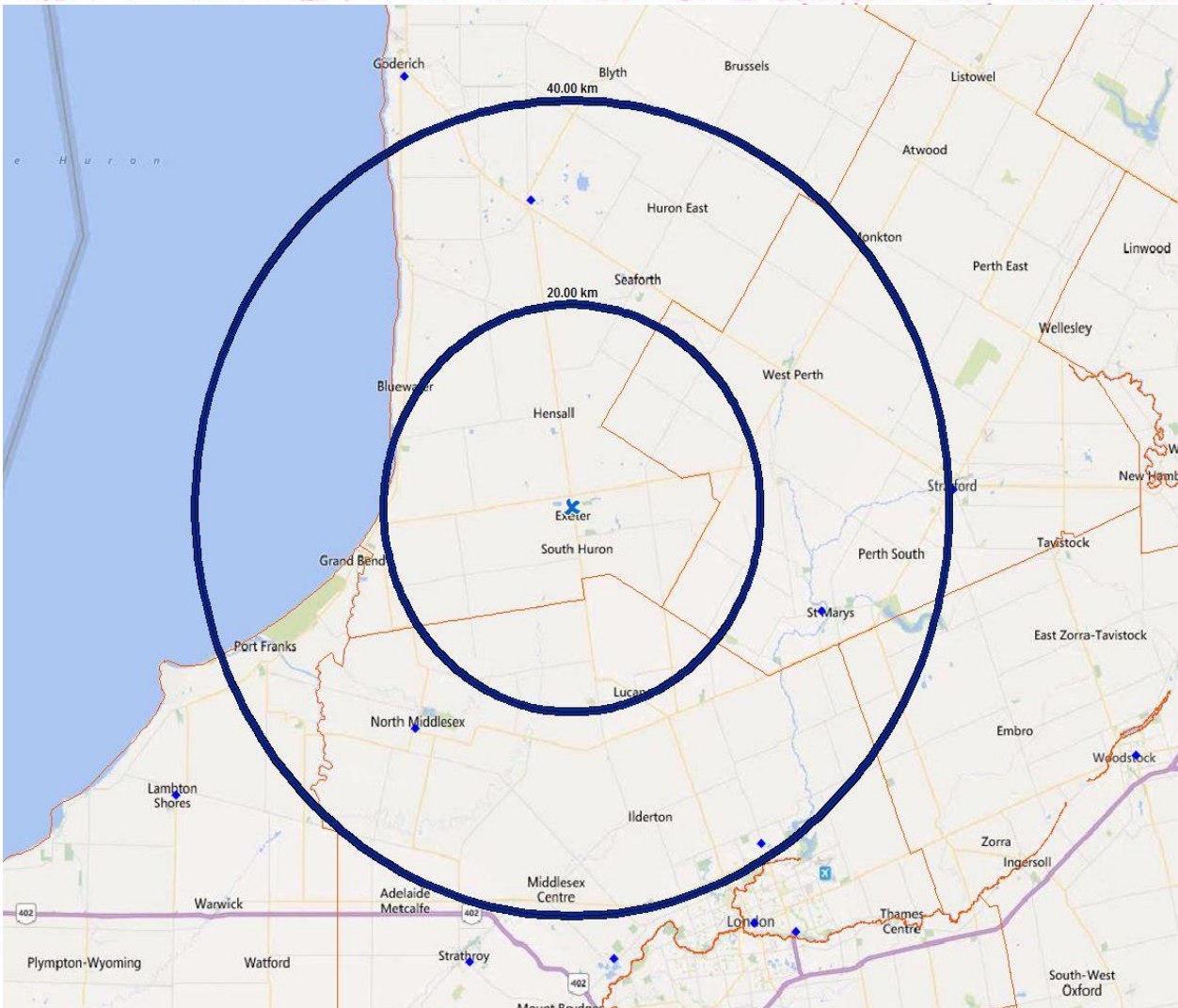
Secondary Market Area
16-30 km radius



Proposed South Huron Market Area #2

Primary Market Area
20 km radius

Secondary Market Area
21-40 km radius



Proposed South Huron Market Area Demographics #1

	Exeter 0 TO 15 Km	Exeter 15 TO 30 Km
POPULATION PROFILE		
2017 Total population	12,647	39,213
2027 Total population	12,962	40,949
% Pop Change 2017-2027	2.5%	4.4%
2017-2027 Average Annual Population Change	.2%	.4%
2017 Daytime Population	13,078	40,459
2017 Median Age	44.1	45.2
2027 Median Age	43.9	45.3



Proposed South Huron Market Area Demographics #2

	Exeter 0 TO 20 Km	Exeter 20 TO 40 Km
POPULATION PROFILE		
2017 Total population	20,138	100,518
2027 Total population	20,945	108,236
% Pop Change 2017-2027	4.0%	7.7%
2017-2027 Average Annual Population Change	.4%	.8%
2017 Daytime Population	18,353	89,138
2017 Median Age	43.3	42.9
2027 Median Age	43.1	43.0



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Thank You!

Questions?

