

Auckland Ice Sports Facility Feasibility Study



Curling



Public Curling



Ice Figure Skating



Public Ice Skating



Ice Hockey



Ice Speed Skating

Prepared for: Auckland Curling Club Inc. (& NZ Curling Association Inc.), Ice Speed Skating NZ Inc., NZ Ice Figure Skating Association Inc. and NZ Ice Hockey Federation Inc.

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1. Executive Summary

This report considers the feasibility of constructing and operating two ice rinks, one for curling and one for ice skating sports, at the Snowplanet site in Silverdale on Auckland's North Shore.

Auckland currently has two privately owned single sheet ice rinks located in West Auckland (Avondale) and East Auckland (Botany). The second and newest of these ice rinks opened in 1999 when Auckland had a population of just under 1.2 million. Twenty years later the population has grown by one-third to almost 1.6 million. Despite the Ice Sports believing that they have sufficient growth potential, and there would be sufficient public use to make a new facility viable, no additional ice facilities have been built. Reasons for this could include the lack of opportunity for the Ice Sports to demonstrate their growth potential, the public interest in ice based recreation not being known, the lack of commercial/private interest, the challenge of securing development funding, the challenge of developing a feasible operating model and lack of a suitable site.

These factors have mobilised and galvanised the Ice Sports to initiate and lead the current project. While a sport led development has both strengths and weaknesses it does provide opportunities not readily available to a commercial operator, e.g. securing community funding. For this reason the feasibility study proposes a sport lead project but acknowledges that there are other options.

Following the identification of Snowplanet as a potential site the Ice Sports entered into a MOU with Snowplanet to develop a proposal to establish an ice rink and curling rink at the site, and complete a feasibility study on that proposal. Funding for the feasibility study was secured from the Lotteries.

Aucklanders have been ice skating and playing ice hockey since 1974 when a rink opened in Glen Innes. Despite not having a purpose built facility and having very limited access to ice time the Auckland Curling Club was established in 1996 and in recent years has ridden the wave of curling rapidly becoming an accessible and desirable sport worldwide. Somewhat unique to curling is that the same playing surface is used by both beginners and elite curlers, able-bodied and wheelchair curlers, both genders and all ages. All the needs of curling can be accommodated in the same curling rink, and players of different experience and ability can – and do – play with and against each other.

Currently Auckland's existing ice rinks provide public ice skating and make ice time available for club ice figure skating, ice hockey, ice speed skating (Avondale only) and curling (Avondale only). Like most ice rinks they rely on public ice skating (approximately 2/3rd of total ice usage) for financial sustainability. The consequence of this reliance on public ice skating is that the ice time available for club/sport use is limited. This places a major constraint on the ability of the Ice Sports to meet growing demand and for curling, without a purpose built facility, to provide a quality product.

Benchmarking shows that ice figure skating and ice hockey memberships in Auckland are constrained by the lack of ice time available and optimally the ice figure skating and ice hockey should have around 50% more ice time to meet the needs of existing members. Curling should have around a third more ice time to meet the needs of its existing members.

Independent market research carried out as part of this feasibility study has confirmed that with respect to ice sports in Auckland distance is a barrier to accessing these recreation and sporting activities. When North Shore survey respondents were asked what would encourage them to participate in ice skating more regularly, 52% said proximity (Albany town centre is 30km from the Avondale rink and 40km from the Botany rink). Likewise when asked what would encourage them to participate in curling more regularly, 46% said proximity.

These findings are supported by looking at the aggregation of members of the Auckland Ice Hockey Association and the Auckland figure skating clubs around the two existing ice rinks. Fifty three percent of the ice hockey players live within 10km of an ice rink and 73% live within 15km of an ice rink. Likewise 67% of the figure skaters live within 10km of an ice rink and 83% live within 15km of an ice rink. Only 16% of the ice hockey players and 6% of the figure skaters live north of the Harbour Bridge. As 70% of the figure skaters are under 18 years of age travelling to the rinks can be a challenge. Those ice hockey players and figure skaters who don't live within 15km of a rink can feel disadvantaged when it comes to accessing ice.

Those surveyed as part of the market research said that if there were ice skating and curling facilities on the North Shore 49% of them (153,000 when extrapolated to the survey population) would likely ice skate and 27% of them (84,000 when extrapolated to the survey population) would likely curl. To these numbers can be added those < 15 years of age who were not surveyed (around 20% of the population), those who would come from other parts of Auckland and from outside of Auckland.

A recent Statement of Need Report for a proposed ice rink in England noted "The typical industry catchment benchmark that drives sufficient demand for a rink to be sustainable is approximately 250,000 people within a 20 to 30-minute drivetime catchment". This benchmark is supported by there being a number of ice rinks in New Zealand, England and Australia operating in locations with populations of around 300,000, or even less. Auckland's Northern Zone had a population of 323,000 in 2018 which is forecast to grow to 430,000 by 2043. Therefore on this basis there is a large enough population on the North Shore to support an ice rink.

There is strong evidence of the need for this project and the development of an ice facility on Auckland's North Shore would improve the quantity and quality of sport and active recreation opportunities available and assist with the vision of making Auckland 'the world's most active city'¹. The support for this are the desires of the Ice Sports for additional ice time, the clear evidence that North Shore residents don't enjoy the access to ice facilities that other parts of Auckland do, that there is a large enough population on the North Shore to support an ice facility and as the independent market research showed the public would use such a facility.

Based on the plans for a full sized ice rink and four sheet curling rink in Canada (opened in 2011), the cost of constructing a similar building in Auckland has been estimated at \$14.8 million (excluding the cost of land and anything other than minor site works). This is on the basis that the structure is a mix of reinforced concrete and steel. Value engineering could reduce this cost by looking closer at the design/layout, and material and structural options including potentially a tensioned fabric structure.

Nowadays, through more advanced techniques and better insulation materials, it is possible to achieve more cost effective construction solutions. The International Ice Hockey Federation and the World Curling Federation have expert working groups looking at the development of ice facilities to, amongst other things, achieve simple and affordable projects to build ice and curling rinks.

Canadian company Sprung provides innovative material and structural solutions for ice rinks and curling rinks across Canada and other parts of the world. Their tensioned membrane structures are engineered for total design flexibility, all-weather performance and strength, long-term quality and cost-effectiveness. Sprung estimate that by using their system they can achieve cost savings of between 25% and 33% when compared to traditional materials and structures.

¹ Aktive Auckland Vision 2020

For the purposes of this report a development cost of \$15 million is considered to be appropriate. This can be further refined with the benefit of local and international work being undertaken, design, layout and construction material refinements.

Potential sources of capital funding include Auckland Council, Lottery Community Facilities, Lottery Significant Projects Fund, Foundation North, Gaming societies, philanthropists, donors, sponsorship, World Curling Federation and commercial (debt or equity) funding.

Significant Auckland Council support is essential to achieve the funding target and undertaking the development. A key purpose of this feasibility study is to provide a basis from which to begin a process to establish that level of support. Significant Council support will leverage other financial and non-financial support. Without significant financial support from Auckland Council the project is unlikely to be achieved.

This proposal is premised on the basis of the facility being built on Auckland's North Shore and specifically on the Snowplanet site in Silverdale, 30 minutes north of the Auckland CBD. Snowplanet is New Zealand's only indoor snow facility offering snow entertainment 365 days a year since 2005. With 14 hectares of land Snowplanet are looking to develop an entertainment precinct to provide a wide variety of complimentary uses on the site. An ice rink is amongst a number of potential opportunities that Snowplanet have identified. The addition of ice rinks to the Snowplanet site should provide synergies through economies of scale and offering additional recreation and sporting options should make an expanded complex even more attractive and financially viable.

For the reasons outlined above for the initiation of this project, the Ice Sports see the development of the proposed facility as a community development rather than a private development. Therefore a charitable trust is proposed as the entity to develop, own and operate the facility. The project can be modelled on the Home of Cycling Charitable Trust who developed, own and operate the Avantidrome Velodrome / National Cycling Centre of Excellence at Cambridge. It identified that significant community use was essential for the financial viability of that facility and through careful planning, marketing, facility management and programme delivery this has been achieved with community use accounting for over 80% of the Avantidrome's use.

There would be two components to the demand for the proposed new ice facilities, the demand from the Ice Sports (i.e. club users) and the demand from the general public/community (i.e. recreational users). The assumptions underpinning the user numbers, and therefore the revenue, set out in the following financial projections have been based on:

- Current figure skating and ice hockey members in Auckland and other New Zealand cities.
- A new market for members for figure skating and ice hockey clubs once there is an ice rink on the North Shore, given that currently 83% of figure skaters and 73% of ice hockey players live within 15km of an ice rink.
- Projected growth in figure skating and ice hockey club membership numbers, and ice use, once the new facility exists and expands the availability of ice in Auckland.
- A conservative estimate, based on the independent market research, is that the number of public ice skaters visiting the Paradise Botany rink on an annual basis is around 125,000.
- The level of responses from those surveyed for the independent market research who said that if there were ice skating and curling facilities on the North Shore they would likely use them.
- The projected growth in curling club memberships based on existing numbers, growth over the past five years previous, despite limited ice time and poor ice, and the attraction of a purpose built/dedicated facility.

- The public/recreational use of the Maniototo Curling International rink in Naseby, and some overseas curling rinks in non-traditional curling countries.

	Year 1	Year 2	Year 3	Year 4	Year 5
Numbers:					
Club Figure Skating (members)	50	55	61	67	74
Club Ice Hockey (members)	150	165	182	200	220
Public Ice Skating (visits)	75,000	82,501	90,751	99,826	109,809
Club Curling (members)	199	219	241	265	291
Public Curling (visits)	10,000	11,000	12,100	13,311	14,642
Total Users	85,399	93,940	103,335	113,669	125,036

	\$'000 (excl. GST)				
Total Revenue	\$1,355	\$1,490	\$1,640	\$1,804	\$1,985
Total Operating Expenditure	987	1,011	1,060	1,090	1,147
Operating Cash Surplus	368	479	580	714	838
Interest Expense	275	271	267	263	259
Depreciation on Equipment	250	250	250	250	250
Net Surplus	(157)	(42)	63	201	329
Add back: Interest Expense	275	271	267	263	259
Add back: Depreciation	250	250	250	250	250
Less: Loan Repayments (P&I)	(348)	(348)	(348)	(348)	(348)
Net Cash Flow	\$20	\$131	\$232	\$366	\$490

There are a number of risks, opportunities and benefits with the development and operation of the proposed ice rink facility. The risks include being unable to secure capital funding, capital cost exceeding budgeted cost, being unable to employ suitable staff, user numbers being less than forecast and financial performance not being as expected.

Mitigation strategies can be put in place for the risks. The opportunities include development cost savings, attracting repeat users, hosting events, complementary attractions at Snowplanet, energy efficiencies through smart design and operation, synergies with Snowplanet and other revenue streams not included in the financial projections. Realisation strategies can be put in place for these opportunities. The benefits include social, recreational, safety, economic, employment and community.

Many areas around New Zealand already support ice facilities, and the demand for ice time will grow as more facilities are established around the country. Industry indicators overseas show strong, clear and continuous growth in recreational ice skating and ice based sports.

Arguably the greatest benefit from the development of ice facilities, on Auckland's North Shore, would be enabling more Aucklanders to take part in activities that are fun, attractive and popular, but difficult to access for those not living near the existing ice facilities. This would improve the quality of sport and active recreation opportunities available and assist with the vision of making Auckland 'the world's most active city'.

Conclusion

The development and operation of the proposed ice rink facilities on Auckland's North Shore on the basis set out in this report is feasible. However the development of the facilities, in particular the funding of the development, will require significant financial and non-financial support from Auckland Council.

2. Introduction

2.1 Background, Aims and Objectives

Ice user groups (i.e. curling, ice hockey, ice figure skating and ice speed skating, collectively the “Ice Sports”) in the Auckland region have for some time identified a growing need for additional ice based facilities in order to make their sports more accessible to the general community, to better serve their members, provide venues for training and local/regional sporting events and for hosting national and international sporting events. Over the past 15 years there have been occasional discussions between the Ice Sports and Auckland Council, including some of its predecessors, regarding the development of additional ice facilities. The stumbling block has generally been lack of a suitable site and lack of capital funding, with the consequence that little progress has been made.

Auckland has a population of almost 1.6 million and currently has two single sheet ice rinks located in West Auckland (Avondale) and East Auckland (Botany). A market has been identified north of the Harbour Bridge that may support an additional ice facility, including a dedicated curling rink.

With the identification of a potential site for new ice facilities at Snowplanet on Auckland’s North Shore and the advent of the Auckland Sport Sector Facility Priorities Plan process the Ice Sports entered into a Memorandum of Understanding (“MOU”) with Snowplanet to develop a proposal to establish an ice rink and curling rink at the site, and undertake a feasibility study on that proposal. Funding for the feasibility study was secured from the Lottery Grants Board.

2.2 The Outcome Required

The proposal agreed to by the Ice Sports and Snowplanet, as documented in the MOU, is to construct two adjacent ice rinks, one for curling (four sheets) and one for the ice skating sports (international or NHL hockey size).

2.3 Report Use

This feasibility study has been prepared for the Ice Sports for the purpose of establishing the feasibility of a third ice rink facility (including an ice rink and a curling rink) in Auckland, likely at the site of Snowplanet in Silverdale. The study highlights potential issues that will be of relevance to the Ice Sports when they consider their decision whether to proceed with the project and to assist them to secure funding to undertake the project. The author accepts no responsibility for any reliance that may be placed on this report should it be used by any other party or for any other purpose that has not been expressly agreed to in writing by the author.

2.4 Disclaimer

This report has been prepared with care and diligence and the statements and conclusions in it have been given in good faith and in the belief, on reasonable grounds, that such statements and conclusions are not false or misleading. However, in no way does the author guarantee or otherwise warrant that any projections of future surpluses or cash flows will be achieved. Projections are inherently uncertain - they are predictions of future events which cannot be assured, they are based upon assumptions, and actual results will vary from the projections and these variations may be significantly more or less favourable.

The author assumes no responsibility arising in any way whatsoever for errors or omissions (including responsibility to any person for negligence) for the preparation of this report to the extent that such errors or omissions result from reasonable reliance on information provided by others or assumptions disclosed in the report or assumptions reasonably taken as implicit.

3. Evidence of Need for the Project

The ice rinks currently in Auckland, Paradise Avondale (West Auckland) and Paradise Botany (East Auckland) are both single sheet rinks and privately owned. In addition to public ice skating the Avondale rink makes ice time available for organised (i.e. club) figure skating, ice hockey, ice speed skating and curling and the Botany rink provides ice time for figure skating and ice hockey.

Like most ice rinks the Paradise rinks rely on public ice skating (approximately 2/3rd of total ice usage) for financial sustainability. This is the typical business model for ice rinks and as the majority of rinks in New Zealand are privately owned it is not possible to determine the real extent of this reliance. The consequence of this reliance on public ice skating is that the ice time available for activities other than public ice skating are significantly limited.

As a recreation, ice skating has been popular in New Zealand since the 19th century. The New Zealand Ice Skating Association (now the New Zealand Ice Figure skating Association) was established in 1937 to govern figure skating, ice hockey and ice speed skating. Skaters initially gathered to practise their skills at outdoor venues with the indoor rinks were established in the 1950s. In 1982 ice speed skating formed its own national association, known as Ice Speed Skating New Zealand and in 1986 ice hockey formed its own association, known as the New Zealand Ice Hockey Federation.

Curling was introduced by Scottish gold miners in the 1870s and New Zealand is now one of the last countries in the world where traditional 'crampit' style of curling is still played on the outdoor ice. While curling boasts the oldest national sporting trophy still being contested in New Zealand it is the indoor version of curling that is rapidly becoming an accessible and desirable sport worldwide.

Figure skating, ice hockey, ice speed skating and curling have over 4,000 active members nationally with over 1,000 them belonging to Auckland clubs. The Auckland figure skating clubs (collectively), Auckland Ice Hockey Association, Hauraki Ice Racing Club and Auckland Curling Club are the largest clubs of their kind in New Zealand. As the two Paradise ice rinks are operating at around full capacity with respect to available ice time the clubs believe they could utilise additional ice to time grow and in the case of curling to establish significant public/recreational curling programmes. Club use alone can't justify the development of ice rinks or make them financially sustainable so the potential for public ice skating and public curling is a critical consideration.

While the two Paradise ice rinks appear to be operating at full capacity with respect to available ice time, for commercial reasons they won't provide any information on public skating numbers or how well the public skating ice sessions are utilised. Accordingly it is not possible to determine whether public skating sessions are well attended. However as the rink operator continues to allocate significant amounts of ice time for public skating, sold on a per head basis, rather than sell it as a block to the Ice Sports we can only assume that the risk and reward from public skating is superior to return the operator can get from the sports. This would suggest that the rinks are being well used by the skating public.

Independent market research (See Appendix 1) has been carried out on the North Shore (800 respondents) and East Auckland (400 respondents) to assess:

- Potential level of usage of an ice facility (ice rink and curling rink) at Snowplanet
- Profiles of potential users of an ice facility (ice rink and curling rink) at Snowplanet
- Awareness and usage of existing Auckland ice facilities (Paradice)
- Profiles of users and non-users of existing Auckland ice facilities (Paradice)

With regards to personal participation, 67% of North Shore respondents and 69% of East Auckland respondents had ice skated before. Nine percent of North Shore respondents and 7% of East Auckland respondents had curled before.

Those surveyed said that if there was an ice skating and curling facility on the North Shore 49% of them (153,000 when extrapolated to the survey population) would likely ice skate and 27% of them (84,000 when extrapolated to the survey population) would likely curl. To these numbers can be added those < 15 years of age who were not surveyed (around 1/3rd of the population), those who would come from other parts of Auckland and from outside of Auckland. The number of people that would likely skate and curl at an ice facility on the North Shore would be higher than these numbers.

The market research also confirmed that distance is a barrier to accessing recreation and sporting activities. When North Shore survey respondents were asked what would encourage them to participate in ice skating more regularly, 52% said proximity (Albany is 30km from the Avondale rink and 40km from the Botany rink). Likewise when asked what would encourage them to participate in curling more regularly, 46% said proximity. These findings are also supported by looking at the aggregation of members of the Auckland Ice Hockey Association and the Auckland figure skating clubs around the existing Paradise ice rinks. Fifty three percent of the ice hockey players live within 10km an ice rink (Avondale or Botany) and 73% live within 15km of an ice rink. Likewise 67% of the figure skaters live within 10km an ice rink and 83% live within 15km of an ice rink. Only 16% of the ice hockey players and 6% of the figure skaters live north of the Harbour Bridge.

A Statement of Need Report for a proposed ice rink in England² notes “The typical industry catchment benchmark that drives sufficient demand for a rink to be sustainable is approximately 250,000 people within a 20 to 30-minute drivetime catchment”. This benchmark is supported by there being a number of ice rinks in New Zealand, England and Australia operating in locations with populations of around 300,000, or even less. As shown in the table below - Key demographic data for Auckland’s Northern Zone (Hibiscus & Bays, Devonport-Takapuna, Kaipatiki and Upper Harbour Local Board Areas) - Auckland’s North Shore exceeds this benchmark.

	2018 Census³	2023 (forecast)⁴	2028 (forecast)	2033 (forecast)	2038 (forecast)	2043 (forecast)	Count Change	% Change
Population	313,101	367,200	393,500	417,900	440,200	461,300	148,199	47%

	0-14 years	0-14 years %	15 – 64 years	15 – 64 years %	65+ years	65+ years
Age Profile	57,888	18.5%	209,568	66.9%	45,645	14.6%

The conclusion for this report is that there is sufficient evidence of the need for this project (developing ice facilities on the North Shore) to warrant further consideration. The development of an ice facility (ice pad and curling pad) on Auckland’s North Shore would improve the quality of sport and active recreation opportunities available and assist with the vision of making Auckland ‘the world’s most active city’. The key reasons for this conclusion are the desires of the Ice Sports in Auckland for additional ice time, the clear evidence that North Shore residents don’t enjoy the access to ice facilities that other parts of Auckland have, that there is a large enough population on the North Shore to support an ice facility and the public will use such a facility.

² Cambridge Ice Rink – Statement of Need (Cool Ventures Ltd)

³ Auckland Council 2018 Census Results

⁴ Statistics New Zealand Subnational Population Projections 2013 (base) – 2043 update

4. Development and Development Costs

4.1 Options Analysis – Different Options to Produce the Outcome

The Ice Sports have identified 3 options when it comes to developing a new ice facility:

- 1 full sized ice rink (30m x 60m = 1,800m²) – ‘minimum’
- 1 full sized ice rink (1,800m²) and a 4 sheet curling rink (5m x 50m = 250m² x 4 = 1,000m²) – ‘optimum’
- 2 full sized ice rinks (3,600m²) – ‘maximum for flexibility and future proofing’

The Auckland Curling Club believe that a dedicated curling rink is essential, and while some in the ice hockey community believe two full sized ice rinks should be planned for (“you can curl on hockey rink but you can’t play hockey on a curling rink”) the Ice Sports agreed that the second option, 1 full sized ice rink and a 4 sheet curling rink, would be the basis for the MOU with Snowplanet.

To be successful, curling needs dedicated facilities because the requirements for curling ice differ from those for other ice sports. Dedicated curling ice must be perfectly level, colder and harder than other sports require, and must be groomed to a much higher standard. Quality curling ice cannot be achieved in a multisport ice rink without extensive preparation (i.e. days). While it is possible to play on general arena ice that has been quickly prepared, curlers liken it to playing lawn bowls on a rugby pitch after the divots have been replaced and the ground has been rolled. The surface is similar, but it is not fit for purpose, and the game is more one of chance rather than skill. The New Zealand Curling Association no longer allow Auckland to hold National Secondary School Curling Championships as they deem the Paradise Avondale ice not good enough despite Auckland Curling Club members spending considerable time preparing the ice. This has been the case in 2018 and 2019 and will continue again in 2020.

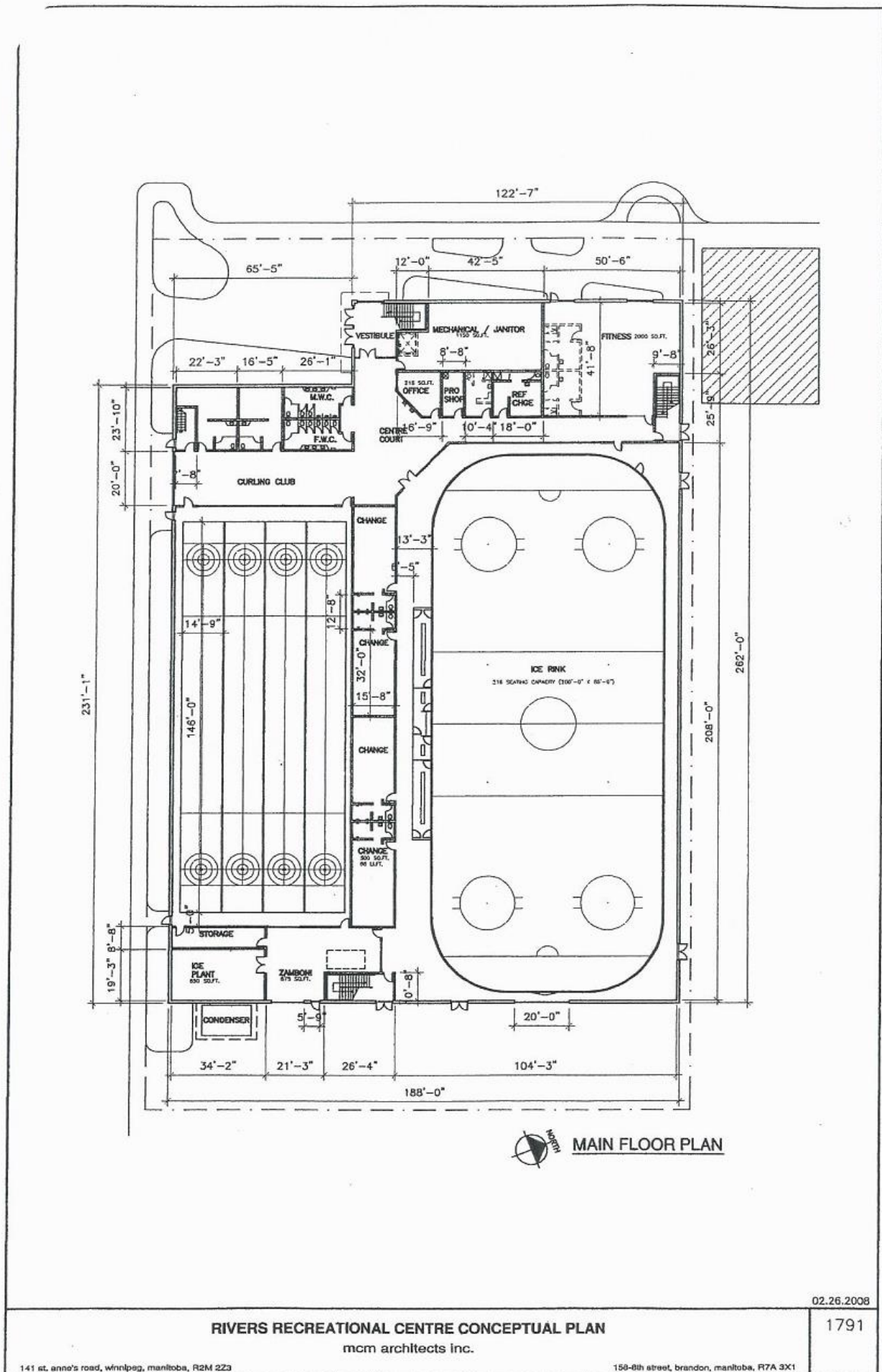
Other option considerations relate to construction of the facility (e.g. design and materials) and the ownership, governance and management of the facility. These are discussed in the relevant sections below.

4.2 Design and Construction

A starting point for design and construction of ice facilities is whether the facility needs to meet international requirements for the Ice Sports, in order to host events, versus being a facility for community use only and unlikely to host national or international events. There are many models for facilities at the community end of the spectrum through to facilities at the major event end of the spectrum, and while those at the major event end tend to cost more they bring with them the potential to deliver event revenue and the associated benefits events brings to the local economy.

As with most buildings there are a range of structural, roofing and cladding options available. To make new facilities cost effective tensioned fabrics and air inflated domes can be used. The International Ice Hockey Federation (“IIHF”) and the World Curling Federation (“WCF”) are both investing in the development of cost effective design and construction options. This information, as it becomes available, is being considered by the Ice Sports.

For expedience the Ice Sports have used the Riverdale Community Centre in Rivers, Manitoba, Canada (opened in 2011) as a model. It contains a full sized ice skating/ice hockey rink and four sheet curling rink. We have been able to get plans and use them as the basis for estimating the cost of constructing a similar building in New Zealand.





Riverdale ice rink



Riverdale curling rink

The building cost has been estimated at \$14.8 million (excluding the cost of land and anything other than minor site works) on the basis that the structure is a mix of reinforced concrete and steel. Value engineering could reduce this cost by looking closer at the design/layout, material and structural options including potentially a tensioned fabric structure.

The two sheet Cockburn Ice Arena in Perth was built for AUD \$10 million (NZ \$10.75m) in 2015 with savings achieved through a simple build that maximised insulation and minimised roof height but left it, by choice, not to the standard required to host international ice hockey games.

Nowadays, through more advanced techniques and better insulation materials, also resulting in more efficient energy use, it is possible to achieve more cost effective construction solutions. IIHF and WCF have expert working groups looking at the development of ice facilities to, amongst other things, achieve simple and affordable projects to build ice and curling rinks.

Canadian company Sprung (see Appendix 2) provides innovative material and structural solutions for ice rinks and curling rinks across Canada and other parts of the world. Their tensioned membrane structures are engineered for total design flexibility, all-weather performance and strength, long-term quality and cost-effectiveness. Sprung estimate that by using their system they can achieve cost savings of between 25% and 33% when compared to traditional materials and structures.



Sprung tensioned fabric structures



For the purposes of this report, and as the basis for further discussion, a development cost of \$15 million is considered to be appropriate. This can be further refined with the benefit of local and international work being undertaken, design, layout and construction material refinements.

4.3 Preferred Location

This proposal is premised on the basis of the facility being built on Auckland's North Shore and specifically on the Snowplanet site. Prior to and during the current work several other sites north of the Harbour Bridge have been identified including Metro Park East, Rosedale Park, Green Road Reserve, Oteha Valley Reserve and the North Shore Domain & Stadium. No formal consideration has been given to these sites as their availability has not been proven.

4.4 Suitability of Proposed Site

The Snowplanet site on Small Road in Silverdale, 30 minutes north of the Auckland CBD, has been identified as a suitable site. Snowplanet is New Zealand's only indoor snow facility offering snow entertainment 365 days a year since 2005. The snowdome, approximately 40 m × 200 m features 50 centimetres of man-made snow, three tows, a terrain park for freestyle skiers and snowboarders and a separate learners slope. It offers rentals and lessons, a wide range of programmes for all abilities and offers group bookings for schools and businesses. It has a small store, restaurant and licensed bar, meeting and conference facilities. With 14 hectares of land Snowplanet are looking to develop an entertainment precinct to provide a wide variety of complimentary uses on the site. An ice rink is amongst a number of potential opportunities that Snowplanet have identified.



With around 160,000 visits to Snowplanet each year it has proven that a dedicated winter sport facility can operate successfully in the Auckland market, and in particularly on Auckland's North Shore. The independent market research supports the contribution that Snowplanet makes to the recreational and sports offerings in Auckland. The addition of ice rinks to the Snowplanet site should provide synergies for both operations through economies of scale, and offering additional recreation and sporting options should make an expanded complex even more attractive and financially viable.

With Snowplanet less than 20 km from the Millennium Institute of Sport & Health it already hosts New Zealand and international skiers and snowboarders for training and competitions. There is the potential for ice facilities at Snowplanet to also host New Zealand and international ice sport athletes and for the athletes to access the services High Performance Sport New Zealand provide from the Millennium Institute.



Snowplanet propose that the potential site for an ice rink facility is in the area to the left of the Snowplanet facility, when looking from SH1 and to the left of Snowplanet's access road (see the red markings below). As the site is not flat and contains overburden from the construction of SH1 some excavation work will likely be required.



The addition of new offerings, including ice rinks, will create a larger entertainment precinct, one-of-a-kind in New Zealand, which will attract users, take advantage of the tourism industry and provide a community facility for the growing residential population in the area.

Snowplanet is a prominent high profile site with great exposure onto the Auckland motorway (SH1). Thirty minutes from the Auckland CBD, 15 minutes from the Albany town centre and with 1.4 million people within a 50km radius the proposed mixed-use entertainment precinct providing entertainment, retail and potentially accommodation will draw in a wider range of visitors for longer periods of time all throughout the year.

4.5 Impact on any Neighbours

The proposed Snowplanet site sits in the General Business Zone – Silverdale 2 Precinct (see Section 4.6 below), approximately 47ha of land located between East Coast Road and the motorway (SH1). As the purpose of the precinct is to facilitate the development of an entertainment cluster and activities are limited to entertainment and recreation activities and accessory activities, it is not anticipated that there will be any material impact on neighbours.

4.6 Likelihood of Resource Consent Being Granted

The proposed Snowplanet site sits in the General Business Zone – Silverdale 2 Precinct (Entertainment).

The Silverdale 2 Precinct applies to approximately 47ha of land located between East Coast Road and the motorway (SH1). The precinct is bounded by the motorway to the west, East Coast Road to the east and the Snowplanet site to the south. It is highly visible from the motorway as the land slopes up significantly from the motorway to East Coast Road.

The purpose of the precinct is to facilitate the development of an entertainment cluster. Activities are limited to entertainment and recreation activities and accessory activities.

The development of this area has a significant impact on the experience of people travelling on SH1 and the Hibiscus Coast Highway. Objectives, policies and standards assists in creating a vegetated landscape, helping to frame the entrance to the Hibiscus Coast Highway.

As many of the buildings used for entertainment and recreation activities involve large utilitarian structures, the provisions aim to ensure that such buildings are designed to achieve a high quality of design and avoid adverse visual effects and mitigation of effects through appropriate landscaping. Activities must not adversely affect the surrounding road network.

It is not anticipated that there will be any issues with the granting of a resource consent.

4.7 Is the Proposed Project Environmentally Sustainable?

The environmental sustainability of an ice rink can be maximised by using reusable and renewable materials and components in construction, minimizing the energy use (e.g. heat recovery, efficient appliances, renewable energy sources etc.), and enabling public transport (e.g. storage for personal the equipment at the rink).

4.8 Proposed Project Timeframes

Q2 & Q3 2020	<ul style="list-style-type: none">Stakeholder engagement (Aktive Auckland, Auckland Council and Sport NZ) on Feasibility Study and Auckland Regional Ice Sports Facility PlanConfirmation of concept, business model, cost and funding plan
Q4 2020	<ul style="list-style-type: none">Submit application to Auckland Sport Sector Facility Priorities Plan process
2021	<ul style="list-style-type: none">FundraisingDetailed design and construction planningConsenting
2022	<ul style="list-style-type: none">Construction
2023	<ul style="list-style-type: none">Opening

5. Construction Funding

5.1 Organisation's Financial Status – Is it Robust?

Other than the Ice Sports, no organisation exists. The Ice Sports do not have the financial resources to undertake the project but do have the ability to attract community funding and in the case of Curling, funding from their international federation.

5.2 Sources of Funding

For the purposes of the feasibility study a build/capital cost of \$15 million, excluding land and associated costs, has been considered.

Potential sources of capital funding include:

- Auckland Council
- Lottery Community Facilities
- Lottery Significant Projects Fund
- Foundation North (formerly ASB Community Trust)
- Gaming societies
- Philanthropists and Donors
- Sponsorship
- World Curling Federation
- Commercial funding

Auckland Council

Auckland Council has established a Sport and Recreation Facilities Investment Fund and plans to invest \$120 million over the next ten years to support the development of regional and sub-regional sport and recreation facilities across the region that address an identified gap in provision.

The 2019/2020 round, first round, had \$7 million available which is expected to steadily increase over coming years. The money is available to maintain, develop and expand facilities to help more people enjoy sport, with all the health and wellbeing benefits that brings and to help in particular communities where participation is low because facilities and opportunities to get involved are less.

People are choosing to participate in a broader range of activities than ever before to stay active and healthy. These activities come in different formats and settings, and sport and recreation facilities need to respond to this. The fund will allow the council to proactively respond to peoples' changing preferences.

Significant facility developments over \$500,000 that involve strong partnerships will be prioritised.

Lottery Community Facilities

Lottery Community Facilities provides grants to improve or build new community facilities. The aim is to get more people involved in community and social activities, and to strengthen communities and bring people together by helping to develop their community facilities. Building project costs may include - new construction projects; lighting and fixed sport or recreational assets such as artificial multi-sport turf, goal posts, net fixtures; professional fees for architecture, quantity surveying and/or for managing the project; and professional fees for a suitably qualified project manager, who is not part of the decision-making group for the project

The last five rounds of Lottery Community Facilities grants included:

\$565,000 Ohaupo Rugby & Sports Club (Waikato)

\$500,000	Te Hiku Sports Hub (Kaitaia)
\$500,000	Sunset Beach Surf Lifesaving Charitable Trust (Port Waikato)
\$500,000	Otago Hockey Association
\$500,000	No. 7 District Federation of NZ Football (South Canterbury, Otago & Southland)
\$500,000	Hamilton City Netball Centre
\$400,000	Omokoroa Sports and Recreation Society (Tauranga)
\$400,000	Ellerslie Sports Club
\$400,000	Eastern Community Sport and Recreation (Christchurch)
\$322,592	The Kamo Sports Charitable Trust Board (Whangarei)
\$300,000	Queen Charlotte Yacht Club (Picton)
\$300,000	Basin Reserve Trust
\$250,000	Southland Softball Association
\$230,000	West Otago Swimming Pool Management Board
\$230,000	Chatham Island Community Swimming Pool Trust
\$225,000	Rotorua Bmx Club
\$210,000	Paremata-Plimmerton Rugby Football Club (Wellington)
\$209,000	Athletics Southland
\$200,000	Hawkes Bay Softball Association
\$200,000	Hawkes Bay Rugby Football Union

Lottery Significant Projects Fund

Lottery Significant Projects Fund provides grants to purchase, create or improve community assets, including sport and recreation facilities that have regional or national significance. It provides grants for capital expenditure projects with a total cost of \$3 million or more.

Recent grants from the Lottery Significant Projects Fund include:

\$3,000,000	Hawke's Bay Community Fitness Centre Trust (2019)
\$356,902	National Equestrian Centre Taupo (2018)
\$890,000	No.7 District Federation of NZ Football (Sth Canterbury, Otago & Southland) (2018)
\$1,500,000	Akarana Marine Sport Charitable Trust (2018)

Foundation North

Foundation North holds in trust for the Auckland and Northland communities an endowment of over a billion dollars. This comes from the sale of the community's shares in what was previously the Auckland Savings Bank. That endowment allows them to make millions of dollars in grants each year to not-for-profit groups in Auckland and Northland.

Outcomes that Foundation North want to see include increased participation in recreation, sports, the arts, cultural activities and other community programmes and events that are life-enhancing. Recent grants have included support for sport and recreation facilities including to Te Hiku Sports Hub Inc. \$1,100,000 and Waitakere City Stadium Trust \$350,000 (twice).

Gaming societies

Community groups across a variety of activities, including sport and recreation, the arts, health and education receive around \$260 million of funding annually from gaming machine societies. Much of it goes back to the region where it was collected from.

The following gaming societies operate in the Hibiscus and Bays area:

- Bluesky Community Trust
- Constellation Communities Trust

- Four Winds Foundation
- Grassroots Trust
- New Zealand Community Trust
- Pelorus Trust
- Pub Charity
- The Lion Foundation

All of these gaming societies could be potential funders for the project. A quick review of some of these societies as they might relate to this project is:

Bluesky Community Trust and Constellation Communities Trust – donations generally in the thousands and small tens of thousands (few over \$25,000) rather than hundreds of thousands. Their appetite for a hundred thousand plus application would need to be determined.

Four Winds Foundation – donations generally in the thousands and tens of thousands (none over \$100,000) rather than hundreds of thousands. Their appetite for a hundred thousand plus application would need to be determined.

Grassroots Trust – donations range from the thousands to a few in the hundreds of thousands. August 2019 was their largest month of donations in the past year and included donations of \$200,000 and \$100,000 Lifeguard Services and \$200,000 to The Bruce Pulman Park Trust.

New Zealand Community Trust – donations range from the thousands to a few in the hundreds of thousands. Over the last two years 12 donations > \$100,000 have been made to sporting organisations ranging \$110,000 to \$347,500.

Pelorus Trust - donations generally in the thousands and tens of thousands (none recently over \$100,000) rather than hundreds of thousands. Over the last 12 months the 5 largest were Baseball NZ \$95,000, Kaitoke Pistol Club (Wellington) \$70,000, Wellington Rugby \$41,000, Gymsports NZ \$35,000 and NZ Softball \$33,250. Their appetite for a hundred thousand plus application would need to be determined.

Pub Charity – donations range from the thousands to a few in the hundreds of thousands. A review of recent donations show a few grants to sporting organisations over \$100,000 with the largest of \$300,000 to Coastguard.

The Lion Foundation – donations range from the thousands to a few in the hundreds of thousands. A review of donations over the last few years shows a number of \$100k plus donations to sporting organisation, up to \$700,000 with one of \$220,000 (for football) and two of \$200,000 (for hockey).

Philanthropists, donors and sponsors

There is likely to be opportunities to source funds from private givers and commercial sponsors. Larger sponsorships could include naming rights to the complex and the two rinks while smaller sponsorships could include wall space, on-ice, dasher boards and the Zamboni.

Potential sponsorship, philanthropists and donor revenue could be:

Overall complex naming rights (5 years?)	\$750,000
Ice Rink naming rights (5 years?)	250,000
Curling Rink naming rights (5 years?)	250,000
Ice Rink - Wall space, on-ice, dasher board & Zamboni - \$150,000/year (3 years?)	450,000
Curling Rink – Wall space & on-ice - \$75,000/year (3 years?)	225,000

Philanthropists and donors

275,000
<u>\$2,200,000</u>

It is likely that the sponsorships would be paid on an annual basis so there would need to be a suitable financing arrangement in place with a bank.

Members and supporters of the Ice Sports, and their personal networks, will be best placed to identify potential private, philanthropic and commercial supporters. It is recommended that the Ice Sports consider this funding source and develop a strategy accordingly.

World Curling Federation (“WCF”)

The WCF offers interest-free loans for the development of new dedicated not-for-profit curling facilities. A loan to the maximum value of USD \$50,000 per sheet is offered over a ten year period to suitable projects. The loan is repaid in eight equal annual instalments starting on the 3rd anniversary of the payment of the loan. The loan must be guaranteed by the Member Association who will be held liable for the repayments. Additionally WCF may also provide curling stones and grooming machines.

Commercial funding

Funding could potentially be secured from a lease partner, e.g. Snowplanet, who would fund part of the development in return for a lease agreement, an operating partner who might provide capital in return for a contract to operate the facility, an equity partner who may be prepared to invest equity in return for a share of operating profits or a lender who might be prepared to lend funding to develop the facility. This could include funding by way of private bonds/debentures, secured or unsecured and with a fixed or variable interest rate, a sharing of risk and return, or interest free.

Summary

With around \$15 million needing to be secured for the project, a potential funding strategy could be:

Auckland Council	\$5,000,000
Lottery Community Facilities	500,000
Foundation North	500,000
Lion Foundation	500,000
Other gaming trusts	500,000
Philanthropists, donors and sponsors	2,200,000
World Curling Federation	300,000
Commercial funding (debt, equity or lease))	5,500,000
	<u>\$15,000,000</u>

5.3 Is the Funding Target Realistic?

Significant Auckland Council support is essential to achieve the funding target and undertake the development. A key purpose of this report is begin a process to establish that level of support. Significant Council support will leverage other financial and non-financial support. Without significant financial support from Auckland Council the project is unlikely to be achieved.

6. Ownership, Governance, Management & Staffing

6.1 Preamble

The second and newest ice rink in Auckland opened in 1999 when Auckland had a population of just under 1.2 million. Twenty years later the population has grown by one-third to almost 1.6 million. Despite the Ice Sports believing for a number of years that they have sufficient growth potential, and there would be sufficient public use to make a new facility viable, no additional ice facilities have been built. Reasons for this could include the lack of opportunity for the Ice Sports to demonstrate their growth potential, the public interest in ice based activities not being known, the lack of commercial/private interest, the challenge of securing development funding without community support, the challenge of developing a feasible operating model and lack of a suitable site.

A combination these factors has mobilised and galvanised the Ice Sports to initiate and lead the current project. While a sport led development has both strengths and weaknesses it does provide opportunities that are not easily available to a commercial operator. For this reason this project, and this feasibility study, proposes a sport led project but recognises that there are other options. The remainder of this section assess the proposal of a sport led project and considers some of the other options. The Ice Sports believe that a sport led initiative can best protect the interests of the sports and the wider community.

Fundamentally the Ice Sports believe that a public private partnership (“PPP”) with Snowplanet has the potential to make the development financially viable. In general terms Snowplanet would provide land, funding for some of the build (to be part of a land and buildings lease) and commercial, facility operating and marketing expertise. Through access to ‘community funding’ the Ice Sports would fund some of the build, provide the fit-out, plant & equipment, long-term usage and community programmes.

6.2 Ownership

For the reasons outlined in the preamble above the Ice Sports see the development of the proposed facility as a community development rather than a private development. Therefore a charitable trust is proposed as the entity to undertake and own the development. The proposed facility will have a long life and is likely to be funded by parties who recognise the long-term benefits that will accrue to the community over the life of the facility. A charitable trust can provide for community ownership and ensure that the original objectives are retained whereas an incorporated society can be subject to the wishes of its members which may change over time. A charitable trust is also likely to have more appeal to and, in some cases, better meet the requirements of a number of community funders. A charitable trust doesn’t pay income tax and also provides the opportunities for donors to the project to receive donation tax credits.

6.3 Governance

A board containing 5 to 9 members could govern the trust with a mix of strengths between members. The board should have one member with experience in finances, one who is a specialist in sales and marketing, another who has general management experience, and one with expertise within sport and leisure industry. To be effective the board should also have a balance of skills and experience, a mix of strategic and operational thinkers and a balance between independent and interested directors. It is expected that the Ice Sports and the community would be represented on the board.

6.4 Management & Staffing

The facility would likely operate 6am to 10pm Monday to Saturday and shorter hours on Sunday. Opening hours may initially be shorter and then extended as use of the facility increases. As an Ice Sports led project, the Ice Sports would be encouraged to manage their own use of the facility within their allotted times, i.e. they would be responsible for organising and delivering their own programmes and activities within the agreed operational policies and procedures. This philosophy would enable the rink operator to minimise the level of paid staff required so that the focus of the paid staff is on the overall management of the facility and serving the public.

The proposed staffing of the facility is:

		Hours/Week	FTEs
Manager	Full time	40	1
Reception/Front of House	Part time	70 to 84	2
Administration	Full time	40	1
Operations	Full time & Part time	82 to 98	2 to 2.5
Maintenance/Cleaning	Part time	56	1.5
		288 to 318	7.5 to 8

6.5 Ownership, Governance, Management & Staffing Options

There are several options possible for the project including private/commercial ownership and management, community ownership and management (including by Auckland Council) and variations in between such as community ownership with private/commercial management (by way of a management contract), community and private/commercial ownership (i.e. an equity partner) with either community or private/commercial management. The table below briefly summaries some of the pros and cons of each of these options:

Private/commercial ownership and management.	Pros: <ul style="list-style-type: none"> • Access to commercial funding. • Access to commercial management expertise.
	Cons: <ul style="list-style-type: none"> • Less attractive to community funders. • Could compromise Ice Sports and community use. • Income tax imposition likely to impact prices. • No private/commercial party identified yet.
Community ownership and management (including by Auckland Council).	Pros: <ul style="list-style-type: none"> • Access to community funding. • Tax exempt as a charity. • Protects Ice Sports and community use.
	Cons: <ul style="list-style-type: none"> • Auckland Council haven't expressed an interest in ownership or management. • Management expertise would need to be developed. • Commercial focus could be diluted.

Community ownership with private/commercial management (by way of a management contract).	Pros: <ul style="list-style-type: none"> • Access to commercial funding. • Access to commercial management expertise.
	Cons: <ul style="list-style-type: none"> • Could be less attractive to community funders. • Might compromise Ice Sports and community use. • Income tax imposition might impact prices. • No private/commercial partner identified yet.
Community and private/commercial ownership (i.e. an equity partner) with community management.	Pros: <ul style="list-style-type: none"> • Access to commercial funding. • Protects Ice Sports and community use.
	Cons: <ul style="list-style-type: none"> • Might reduce access to community funding. • Might impact tax exemption as a charity. • Management expertise would need to be developed.
Community and private/commercial ownership (i.e. an equity partner) with private/commercial management.	Pros: <ul style="list-style-type: none"> • Access to commercial funding. • Protects Ice Sports and community use. • Access to commercial management expertise.
	Cons: <ul style="list-style-type: none"> • Might reduce access to community funding. • Might impact tax exemption as a charity.

6.6 Capability of the Organisation to Manage the Project

With an appropriately qualified and experienced board along with suitably led and trained staff the proposed charitable trust would be able to manage the project.

An example that could followed is that of the Home of Cycling Charitable Trust who developed, own and operate the Avantidrome Velodrome / National Cycling Centre of Excellence at Cambridge. It identified that significant community use was essential for the financial viability of that facility and through careful planning, marketing, facility management and programme delivery this has been achieved with community use accounting for over 80% of the Avantidrome's use.

6.7 Potential or Existing Conflicts of Interest

No existing or potential conflicts of interest have been identified.

7. Users of the Proposed Facility

7.1 Introduction

There will be two components to the demand for the proposed new ice facilities, the demand from the Ice Sports (i.e. club users) and the demand from the general public/community (i.e. recreational users). While the Ice Sports have a demand for more ice time that demand will always likely be less than the public demand and it is public use of the facility that would make the facility financially sustainable.

The two existing rinks in Auckland offer learn to ice skate programmes, public ice skating, school programmes, after school programmes and space for hire for figure skating, ice hockey, ice speed skating (Avondale only) and curling (Avondale only).

The combined hours the existing rinks provide for public ice skating each week are:

	Avondale	Botany	Total	Annual (Est.)
School Terms	32.75	45.75	78.5	3,140
School Holidays	45.5	51.5	97.0	1,092
Total Public Use	78.25	97.25	175.5	4,232

While the Paradise ice rinks have declined to provide any information regarding their user numbers, the independent market research carried out provides some indication as to the level of public skating at the Botany rink. Of those surveyed from East Auckland 39% of those who had visited the rink had used it in the last 12 months. When extrapolated to the survey population this equates to 30,000 people and doesn't include those < 15 years of age who were not surveyed (around 20% of the population). Of those surveyed from the North Shore 20% of those who had visited the rink had used it in the last 12 months. When extrapolated to the survey population this equates to 16,000 people and doesn't include those < 15 years of age who were not surveyed.

These 46,000 (30,000 + 16,000) people will be only a portion of those who visit the Botany rink annually. Like those who travel from the North Shore to the Botany rink, others will travel from other parts of Auckland. Taking the results of the market research, excluding the likely catchment of the Avondale rink, including those < 15 years of age who were not surveyed (who make up around 20% of the population and as an age group will represent a large proportion of ice skaters) and excluding visitors from outside of Auckland, a conservative estimate of the number of public ice skaters visiting the Botany rink on an annual basis is 125,000.

In addition to the public use set out above, the Ice Sports use the following additional hours:





		Annual (Est.)
Figure skating	23.75 hours/week during term time	1,100
Ice Hockey	Estimated annual hours	800
Ice Speed Skating	2 hours/week year round	100
Curling	6 hours/week May to October	150
Total Club Use		2,150
Total Rink Use (approx. 100% of potential available hours)		6,382

The Ice Sports (i.e. clubs) therefore use approximately 34% of the ice time used each year and have indicated that this would be an appropriate allocation of ice time for a new facility and as set out below, they believe they would be able to use the 50% additional amount of time that a third rink would offer.

Currently, between public use and Ice Sports use approximately 100% of available hours appear to be being utilised but because the operators of the Paradise ice rinks have declined to provide user information it is not possible to determine the level of capacity utilisation within the public ice skating hours, i.e. how many skaters are on the ice during each public session. Noting that despite several requests the Paradise rinks won't provide additional ice time to the Ice Sports which suggests that the operator is happy with the current level of capacity utilisation within the public ice skating hours.

7.2 Club Figure skating

There are four ice figure skating clubs in Auckland.

	Est.	Location & Ages	Membership					
			Members			Participants		
			Total	Male	Female	Total	Male	Female
Allegro Ice Dance Club	2003	Botany	53	4	49	49	3	46
		0-12 yrs	24	2	22	24	2	22
		13-18 yrs	5	0	5	5	0	5
		18+ yrs	24	2	22	20	1	19
Auckland Ice Figure Skating Club	1972	Botany	112	18	94	59	6	53
		0-12 yrs	26	3	23	26	3	23
		13-18 yrs	27	3	24	27	3	24
		18+ yrs	59	12	47	6	0	6
Glenburn Figure Skating Club	1982	Avondale	45	10	35	33	6	27
		0-12 yrs	14	2	12	14	2	12
		13-18 yrs	6	1	5	6	1	5
		18+ yrs	25	7	18	13	3	10
West Auckland Ice Skating Club	2006	Avondale	26	9	17	11	1	10
		0-12 yrs	2	0	2	2	0	2
		13-18 yrs	4	1	3	4	1	3
		18+ yrs	20	8	12	5	0	5
Total		0-12 yrs	66	7	59	66	7	59
		13-18 yrs	42	5	37	42	5	37
		18+ yrs	128	29	99	44	4	40
			236	41	195	152	16	136
Male/Female percentage				17%	73%		11%	89%
Age Percentage		0-12 yrs	28%	17%	30%	43%	44%	44%
		13-18 yrs	18%	12%	19%	28%	31%	27%
		18+ yrs	54%	71%	51%	29%	25%	29%

With Auckland ice skating clubs having 236 members, of which 152 are active skaters, it has 30% of the New Zealand Ice Figure Skating Association ("NZIFSA") members and 25% of active skaters.

Auckland's figure skaters are largely clustered around the existing rinks (Avondale or Botany) with 67% of them living within 10km an ice rink and 83% living within 15km of an ice rink. Only 6% live north of the Harbour Bridge. Membership growth over the past five years has been 33% with 7% of that in the last year.

The NZIFSA believes that an ice rink on the North Shore and access to additional ice time will provide an opportunity for more people to figure skate and that as around a third of the Auckland population lives north of the Harbour Bridge it is logical that with promotion and learn to skate programmes in time there could be around 50% (approx. 75) more figure skaters in Auckland. It is noted that with Dunedin having 143 club figure skaters and Christchurch 176 there should be considerable potential for growth in the number of figure skaters in Auckland.

The assumption for the financial projections (See Section 8 and Appendix 3) is that in year 1 there would be 50 new figure skaters growing at 10% per year to 74 in year 5.



7.3 Club Ice Hockey

Although ice hockey has been played in Auckland since the first ice rink was built in the 1970's, the Auckland Ice Hockey Association ("AIHA") traces its origins back to the Auckland Ice Hockey Council, established in 1987. The name was changed to Auckland Ice Hockey Association Inc. in 1994.

The aim of the AIHA is to develop, promote and administer the sport of ice hockey at all competitive, representative, social and learner levels, within the Auckland region. The AIHA offers programmes for all ages and all skill levels. These include Learn to Play, Under 9 & 12 Super Leagues, Bantam League, Junior League, Representative Hockey (U15, U18, U120 & Women's), Women's Hockey, Adult Hockey League and NZIHL (the West Auckland Admirals and the Botany Swarm).

The AIHA has a membership of around 650, ranging from 4 year old Learn-to-Play novices, through to 60+ Senior Non Check players. The Adult Hockey League is the largest league with over 350 adults playing in winter and summer league. Growth, with the current ice time available, is expected to be about 10% per annum in all leagues. By age the membership of AIHA is:

0-12 yrs	76	11%
13-18 yrs	110	17%
18+ yrs	475	72%
	<u>661</u>	<u>100%</u>



With the AIHA having membership of 650 it is the largest of New Zealand Ice Hockey Federation's four regions making up 40% of the national membership. Like figure skating, AIHA members are largely clustered around the existing rinks (Avondale or Botany) with 52% of them living within 10km of an ice rink and 76% living within 15km of an ice rink. Only 16% live north of the Harbour Bridge. Growth over the past five years has been 18% with 10% of that in the last year. In the first two weeks of AIHA's 2020 Learn to Play programme they have hosted 220 children compared to 140 at the same point last year.

Annually the AIHA purchases around 800 hours of ice time from the Paradise ice rinks. Like figure skating, the AIHA believes that an ice rink on the North Shore and access to additional ice time will provide an opportunity for more people to play ice hockey. As around a third of the Auckland population lives north of the Harbour Bridge it is logical that with promotion and learn to play programmes in time there could be around 50% (approx. 325) more ice hockey players in Auckland with AIHA using an additional 50% (400 hours) of ice time to accommodate those players and provide additional ice time to existing members.

The assumption for the financial projections (See Section 8 and Appendix 3) is that in year 1 AIHA would use an additional 400 hours of ice time growing by 10% per year to 733 hours in year 5. This is based on attracting 150 new members initially (and growing by 10% per year), using half of the additional time, and using the other half of the time to provide an additional 25% of ice time to existing members for more training and games.



7.4 Ice Speed Skating

The Hauraki Ice Racing Club is based at the Paradise Avondale ice rink using 2 hours of ice time each week. The Club currently has 89 members with 49 racers (40 male & 9 female) aged between 6 and 59 years. It is the largest ice speed skating club in New Zealand providing 50% of the national racers. Skaters are mainly Asian, 70% Chinese and 15% Korean. About 5 years ago the Club established a programme at the Paradise Botany ice rink but they didn't get the numbers needed so closed that programme in 2018 and have no current plans to try again. While the Club may look to establish a presence at the proposed facility this is far from certain and accordingly the feasibility study excludes any use by ice speed skating.



7.5 Public Ice Skating

Independent market research has been undertaken that included the potential level of usage of an ice rink at Snowplanet.

With regards to the future use of an ice rink at Snowplanet the market research found that, of those surveyed from the North Shore, 49% would likely use it. This equates to 153,000 people when extrapolated to the survey population and to 275,000 annual visits when likely frequency of use is factored in.

With regards to the future use of an ice rink at Snowplanet the market research found that, of those surveyed from East Auckland (the Howick Local Board Area), 37% would likely use it. This equates to 42,000 people when extrapolated to the survey population and to 75,000 annual visits when likely frequency of use is factored in.

To these numbers (195,000 people and 350,000 annual visits) can be added those < 15 years of age who were not surveyed, those who would come from other parts of Auckland and those from outside of Auckland. Therefore based on the market research there is a sufficient demand from the public to support an ice skating rink on the North Shore.

A number of companies offer portable ice rinks and artificial "ice" rinks. They encourage people to "have a go" at ice skating, and can be helpful as a marketing vehicle for getting people involved with ice sports. In recent years portable ice rinks have operated in a number of locations including Aotea Square (for 8 consecutive years) and Westfield Albany in Auckland.



Aotea Square Ice Rink (Auckland)

Portable ice rinks and artificial ice rinks are not a substitute for permanent ice rinks, but the reported levels of use demonstrate a level of public interest in ice skating, e.g. "Organiser expected to see more than 20,000 visitors through its doors during that time" – Aotea Square (6 weeks mid-June to end of July 2019)

As noted earlier, it is conservatively estimated that Paradise Botany has in the order of 125,000 public skaters visiting annually. The only other information available in New Zealand is from the Dunedin Ice Stadium which sees around 20,000 annual visits from a population that is about 1/7th of that available to Paradise Botany. It has also been noted above that Snowplanet has in the order of 160,000 visits annually. Based on this and the market research, the assumption for the financial projections (See Section 8 and Appendix 3) is that in year 1 there would be 75,000 public ice skating visits growing by 10% per year to 110,000 in year 5.

7.6 Club Curling



The Auckland Curling Club was formed in 1996 and is the largest in New Zealand with 175 members (102 school age and 73 non-school age). The Club is affiliated to the New Zealand Curling Association, which is itself a member of the World Curling Federation. The club provides both competitive and recreational opportunities for both males and females of all ages and abilities to curl.

Curling is rapidly becoming an accessible and desirable sport worldwide. Over 60 countries are now members of the World Curling Federation, and it is the fastest-growing Winter Olympic sport. Somewhat unique to curling is that the same 'playing surface' is used by both beginners and elite curlers, able-bodied and wheelchair curlers, both genders and all ages. All the needs of curling can be accommodated in the same curling rink, and players of different experience and ability can – and do – play with and against each other.

Auckland Curling is based at Paradise Ice Rink in Avondale which is the only choice available to them. Curling has limited access to the rink, currently 6 hours per week from May to October. With very limited ice time and not having a dedicated facility there is currently no real opportunity for the Club to grow the sport in Auckland. Despite this growth in Club membership over the past five years has been 44% with 17% of that in the last year.

The Club has grown its school competition from 6 teams in 2002 to 22 in 2019 and 102 players. Additional schools and players are interested when space (i.e. ice time) becomes available. In 2018 there were 86 players from four schools with the 86 including 65 girls and 36 of the 86 being Asian. There have also been a number of Pasifica players over the years. Auckland school teams have won the New Zealand Secondary School Championships and a number of Auckland students have gone on to represent New Zealand in curling. Over the years the club has had teams and individuals participating from 23 Auckland schools.

Limited ice time and high interest means that the school curlers can't curl every week. This has meant that curling has been removed as a sport recognised by College Sport Auckland as one of their requirements is that students must be able to do their sport every week. Further the limited ice time means that the students don't get any opportunity to train.

The Auckland Curling Club's long-term plan is to achieve a dedicated, sustainable curling facility within the Auckland region. Ideally it would have a minimum four sheets of curling ice, a cafe/bar area and viewing area. Recreational curling, competitive leagues and national / international events can take place in the same curling rink, as happens at the Naseby and Dunedin rinks.

The Auckland Curling Club believes that it has significant growth potential with a purpose built facility. To support this it cites the number of participants that have curled in the limited number of beginner curling sessions it has been able to offer over the past four years, 2016 – 109, 2017 – 391, 2018 – 572 & 2019 – 224. The reduced number in 2019 arose through a combination of needing the available ice time for club member use and being unable to get additional ice time to run introductory session.

The Auckland Curling Club project the following medium-term annual "club" use of the proposed facility:

		Annual sheet hours
Club mixed doubles	2 hours/week for 30 weeks	240
Club stick/wheelchair	2 hours/week for 30 weeks	240
Club M, W & M4	18 hours/week for 30 weeks	720
Club schools & U21	50 hours/week for 30 weeks	1,200
Club seniors M, W & M4	18 hours/week for 30 weeks	720
Club CHN/KOR league	2 hours/week for 30 weeks	240
Corporate	2 hours/week for 30 weeks	240
Bonspiels		224
Total club curling		<u>3,824</u>

This level of use would see the Club grow from its current membership of 156 to around 450 members. The assumption for the financial projections (See Section 8 and Appendix 3) is that in year 1 there would be 200 members growing by 10% per year to 300 in year 5.

7.7 Public Curling

Independent market research has been undertaken that included the potential level of usage of a curling rink at Snowplanet.

With regards to the future use of a curling rink at Snowplanet the market research found that, of those surveyed from the North Shore, 27% would likely use it. This equates to 84,000 people when extrapolated to the survey population and to 126,000 annual visits when likely frequency of use is factored in.

With regards to the future use of a curling rink at Snowplanet the market research found that, of those surveyed from East Auckland, 19% would likely use it. This equates to 22,000 people when extrapolated to the survey population and to 35,000 annual visits when likely frequency of use is factored in.

To these numbers (106,000 people and 161,000 annual visits) can be added those who would come from other parts of Auckland and those from outside of Auckland. Therefore based on the market research there is a sufficient demand from the public to support a curling rink on the North Shore.

Public curling is a fast growing recreation in both New Zealand and other parts of the world. It is becoming increasing an option for corporate functions, family functions and other events. In New Zealand the Maniototo Curling International rink in Naseby has become a “must do” activity for those riding the Otago Central Rail Trail and other visitors passing through Central Otago with over 15,000 visits each year.

Internationally the 3 sheet Fentons Curling Rink in Kent, 1 hour south of London, has demonstrated and capitalised on the interest in public curling since opening in 2004. It doesn’t have members and is primarily a place for corporate and private bookings. Today they host over 14,000 visitors per season (September to April) by providing a range of fun sessions.

The curling rink in Tallinn (population 427,000), Estonia, not a traditional curling nation by any means, with a 3 sheet facility has experienced significant growth through focusing on public, corporate and tournament curling. In the 2018/19 year there were over 6,000 visits.

The assumption for the financial projections (See Section 8 and Appendix 3) is that in year 1 there would be 10,000 public curlers growing by 10% per year to 14,500 in year 5.



7.8 Pricing

Entry prices for the proposed facility will generally be based on those already in the market place and these prices are the basis for the assumptions included in the financial projections (See Section 8 and Appendix 3)

7.9 Events

Events inspire and motivate local club/organisation and their members, help attract new members and can bring economic benefits to both the club and local communities. The proposed facility would likely have the ability to host local, national and potentially international ice sport events.

The New Zealand Ice Hockey Federation has the opportunity annually to host a six team international tournament that would bring in excess of USD \$200,000 (\$NZ 317,000) including ice rental, accommodation, food, activities and transport.

The New Zealand Curling Association would be able to host a number of international events and by utilising both the curling rink and the ice skating rink, major international curling events. The 2018 World Mixed Curling Championships held in Kelowna, Canada brought in 350 out-of-towners, including 140 players, and an economic benefit to the local community of CAD \$1.2 million (NZ \$1.4 million).

7.10 Marketing

Marketing will be required to promote the proposed ice facility and to ensure on-going user awareness. This marketing should be done in conjunction with the Ice Sports, especially the initial marketing, to raise awareness as both a club facility and public facility. The marketing plan should recognise the users will be local and visitors from other parts of Auckland and New Zealand. This will require a marketing plan that has both a local (greatest emphasis) and national focus (lesser emphasis).

The marketing plan should also recognise that in the case of public ice skating nearly 75% of the users will likely be 18 years old or less and in the case of curling 75% of the users are likely to be over 18 years old. Marketing strategies and methods will need to be tailored to those markets.

The market research shows that the Asian demographic appears to provide a promising potential market for both current and any potential ice facilities due to their apparent high level of receptiveness or interest. Marketing should also be tailored to this market.

Marketing could also be undertaken in conjunction with Snowplanet, to market the addition of ice facilities to the existing Snowplanet entertainment precinct and to reach the existing Snowplanet users, many of who are likely to also be interested in experiencing the ice sports.

7.11 Nearest Similar Facility

As part of considering the feasibility of the proposal it is important to consider existing facilities to minimise duplication and maximise the use of resources.

Auckland currently has two single sheet ice rinks located in West Auckland (Paradise Avondale est. 1981) and East Auckland (Paradise Botany est. 1999). These facilities are aging, don't provide a designated curling rink and importantly they are located south of the Auckland Harbour Bridge and 40km and 50km respectively from Snowplanet. As already noted a significant number of figure skaters and ice hockey players live in close proximity to the existing ice rinks with very few living on the North Shore. The independent market research also confirmed that distance is a barrier to accessing recreation and sporting activities. When North Shore survey respondents were asked what would encourage them to participate in ice skating more regularly, 52% said proximity. Likewise when asked what would encourage them to participate in curling more regularly, 46% said proximity.

The fact that both existing rinks are privately owned is a risk to the sports, and the public who skate at those rinks, should the current owners decide to close the rinks and sell the land they are sited on for potentially greater financial returns.

For these reasons, and as shown by the independent market research, there is a market north of the Auckland Harbour Bridge and the Ice Sports believe that market can support an additional ice sports facility without significantly impacting either of the existing rinks. Such a development would open up opportunities for grassroots and casual use by thousands of community users who currently are unlikely to cross the Auckland Harbour Bridge to use either of the existing ice rinks.

7.12 Community Support for the Proposed Project

Relevant findings from the independent market research include:

- 84% of North Shore respondents expressed that they were supportive of the proposed facility.
- Nearly half of those respondents (49%) said that they would use the proposed facility for ice skating, while just over a quarter (27%) said they would use it for curling.
- Participation rates in both curling and ice skating tended to be greater among those aged < 40.
- Asian respondents tended to have proportionately lower awareness of the existing facilities but those aware were also significantly more likely to have visited the facilities within the last year.
- The Asian demographic were significantly more inclined to say that they would likely use the proposed facility for both ice skating and curling. The Asian demographic appears to provide a promising potential market for both current and any potential ice facilities due to their apparent high level of receptiveness or interest.
- Those who indicated their support of the proposed ice facility were asked what they thought the positives of the facility were. The key positives included more or new options, the location and the associated benefits for younger audiences.
- A strong relationship exists between Snowplanet users and the intended use of the potential facility. That is, users of Snowplanet were more likely to say they would be likely to use the facility and that there were others in their household that would likely use the facility.
- Household income does not appear to be a determinant to interest in or use of ice facilities.

7.13 Community Resistance for the Proposed Project

In the independent market research those who said they did not support the proposed facility were asked what their concerns were about the facility. The key concerns included they had no interest or had personal barriers, pricing, distance and ratepayer cost.

8. Financial Projections

Detailed financial projections are set out in Appendix 3. The assumptions supporting the financial projections are set out in Appendix 3 and supported by discussion in Sections 4 (Development Costs), 5 (Construction Funding), 6 (Staffing) and 7 (Users).

Projections are inherently uncertain. They are predictions of future events which cannot be assured. They are based upon assumptions, many of which are beyond the control of the entity and their management team. Actual results will vary from the projections and these variations may be significantly more or less favourable.

8.1 Five Year Operating Financial Projections

\$'000 (excl. GST)	Year 1	Year 2	Year 3	Year 4	Year 5
Revenue					
Ice Rink - Club Figure Skating	\$60	\$66	\$73	\$80	\$88
Ice Rink - Club Hockey	122	134	147	162	178
Ice Rink - Public Use	836	920	1,012	1,113	1,225
Curling Rink - Club Use	109	119	132	145	160
Curling Rink - Public Use	228	251	276	304	334
Total Revenue	1,355	1,490	1,640	1,804	1,985
Operating Expenditure					
Advertising & Marketing	68	67	66	63	69
Insurance	38	41	45	50	55
Light, Heating & Power	300	315	331	347	365
Rates incl. Water	61	62	64	65	67
Repairs & Maintenance	38	45	53	60	68
Wages & Salaries	359	359	378	378	395
Other	123	122	123	127	128
Total Operating Expenditure	987	1,011	1,060	1,090	1,147
Operating Cash Surplus	368	479	580	714	838
Interest Expense	275	271	267	263	259
Depreciation on Equipment	250	250	250	250	250
Net Surplus	(157)	(42)	63	201	329
Add back: Interest Expense	275	271	267	263	259
Add back: Depreciation	250	250	250	250	250
Less: Loan Repayments (P&I)	(348)	(348)	(348)	(348)	(348)
Net Cash Flow	\$20	\$131	\$232	\$366	\$490

8.2 How will Long Term Maintenance of the New Facility be Funded?

The projected financial statements include an annual budget for repairs & maintenance and the depreciation fund would be used to replace plant & equipment as required.

For the purposes of the financial projections only plant & equipment is being depreciated. This is on the basis that items of plant & equipment will have lives shorter than the life of the building and will have to be replaced from time to time during the life of the building. It is expected that the replacement of the building at the end of its life would be a new project.

8.3 Sensitivity Analysis

Sensitivity analysis on the projected Year 1 net cash flow has been examined in the table below:

	\$'000	Net cash flow +/- 10%	Net cash flow +/- 20%
Base case (as above)		20	20
Decrease in revenue of 10% & 20%		(107)	(233)
Increase in revenue of 10% & 20%		147	273
Increase in expenditure of 10% & 20%		(79)	(177)
Decrease in expenditure of 10% & 20%		119	217
Decrease in revenue of 10% & increase in expenditure of 10%		(204)	
Decrease in revenue of 10% & increase in expenditure of 20%		(302)	
Decrease in revenue of 20% & increase in expenditure of 10%		(330)	
Decrease in revenue of 20% & increase in expenditure of 20%		427	
Increase in revenue of 10% & increase in expenditure of 10%		47	
Increase in revenue of 10% & increase in expenditure of 20%		(52)	
Increase in revenue of 20% & increase in expenditure of 10%		173	
Increase in revenue of 20% & increase in expenditure of 20%		72	
Decrease in revenue of 10% & decrease in expenditure of 10%		(9)	
Decrease in revenue of 10% & decrease in expenditure of 20%		89	
Decrease in revenue of 20% & decrease in expenditure of 10%		(136)	
Decrease in revenue of 20% & decrease in expenditure of 20%		(40)	
Increase in revenue of 10% & decrease in expenditure of 10%		246	
Increase in revenue of 10% & decrease in expenditure of 20%		346	
Increase in revenue of 20% & decrease in expenditure of 10%		374	
Increase in revenue of 20% & decrease in expenditure of 20%		1,076	

Cash flow deficits are unlikely to acceptable which means that should revenues be lower than projected the operation of the facility would need to be closely monitored against budgets including user numbers, so that actions can be undertaken within a timely manner.

Conversely should revenues be higher than projected or expenses lower, then the facility is likely to enjoy higher net cash flow and build up cash reserves.

The most significant expense is wages and salaries. Hours will need to be carefully managed, especially should revenue be less than expected. Other operating costs will be relatively fixed but where costs are variable they should be carefully managed.

It is likely that working capital will need to be secured to fund some initial operating costs, e.g. marketing, wages & salaries, supplies etc. until operating cash flow commences. This could be part of the fundraising or a bank loan may be possible.

9. Risks, Opportunities & Benefits

There are a number of risks, opportunities and benefits that exist around the operation of the proposed ice rink facilities. The risks and opportunities are outlined below and the benefits on the following page:

Risks	Mitigation Strategies
Capital funding – Unable to secure capital funding.	Well planned approach to fundraising using well prepared applications and/or presentations.
Capital costs - The capital cost exceeding budgeted cost as there may only be finite funds to complete the project.	Construction methodology confirmed and fully costed before construction commences. Expenditure is monitored and changes to capital funding and/or capital expenditure are made accordingly.
Staffing – Suitable operational staff are unable to be employed.	Comprehensive position descriptions and person specifications are developed and robust recruitment processes undertaken.
User numbers – Actual users of the facility are less than forecast.	Close working relationship with the Ice Sports and Snowplanet, a robust marketing plan is put in place, along with the associated financial commitment, and outcomes are monitored regularly.
Financial performance – Financial performance is not as expected because of lower visitor numbers or higher expenses.	Budgets set with monthly reporting back on actual results, including variance analysis, so if any problems emerge that they can be identified and mitigated in a timely manner.

Opportunities	Realisation Strategies
Development cost savings – work currently being done internationally could reduce development costs.	Work closely with international federations.
Attracting repeat users – It is desirable to operate the facility in a manner that will generate repeat visitors.	Devise initiatives and programmes that encourage repeat users including working closely with the Ice Sports.
Events (not included in projections) – hosting events can bring financial and other benefits.	Work closely with national and international federations to identify potential events.
Complementary attractions - Given that it is proposed to site the facility at Snowplanet there is an opportunity to help attract users to each other's facility.	Consider possible joint pricing, or a discounted price to visit both facilities so that they are complimentary attractions.
Energy efficiencies – this is a rapidly developing area and it could be that expenditure on light, heating & power will be lower than projected.	Thorough examination of costs during design and planning stages.
Synergies – There are a range of potential synergies available with Snowplanet that could provide unbudgeted financial benefits to the proposed facility.	Explore synergies with Snowplanet. These could include management, marketing, front-of-house, hospitality and maintenance.

Opportunities	Realisation Strategies
Other revenue streams – There are a number of potential additional revenue streams that have not been included in the financial projections and could bring net financial benefits.	Carefully consider other revenue streams including the expected risk and return. These could include events, snack bar/café, hospitality and coaching programmes including school holiday programmes.

The benefits to a community of well-designed, financially sustainable ice facilities are:

Social

- Provides extra recreational opportunities for families and people to meet each other.
- Provides safe environment for healthy, entertaining and affordable activities for people of all ages and genders.
- Youth who participate in positive recreation and social activities are less likely to get into trouble with the law or take part in potentially harmful activities such as drinking alcohol to excess.

Recreational

- Ice skating is a lifetime activity. People of all ages and abilities can enjoy it, as often as they like, rain or shine.
- Ice skating and curling are wonderful forms of cardiovascular exercise with vast health benefits including joint and muscle health, improved balance, coordination and weight management, and stress management.
- Better opportunity for locals to represent New Zealand in an ice sport than traditional sports.
- Four more Olympic sporting options within the community, ice figure skating, ice hockey, ice speed skating and curling.

Safety

- Secured area where parents can feel at ease leaving their children unattended in, as opposed to other popular “hang outs” like shopping malls.

Economic

- Brings people from other communities into the area.
- Local merchants and businesses benefit from initial construction and ongoing maintenance.
- Will attract regional, national and international sporting competitions and tournaments, benefiting local accommodation, transport, restaurants and shops.
- Recreation and entertainment industries suffer very little during times of economic depression.

Employment

- Provides employment for local residents.

Community

- A shared goal unites a community.
- Developing an ice rink facility promotes a sense of achievement within the community.

Many areas around New Zealand already support ice facilities, and the demand for ice time would grow if more facilities were established around the country.

Arguably the greatest benefit from the development of proposed ice facilities would be enabling more Aucklanders to take part in activities that are fun, attractive and popular, but difficult to access for those not already living near the existing ice facilities. This would improve the quality of sport and active recreation opportunities available and assist with the vision of making Auckland ‘the world’s most active city’.