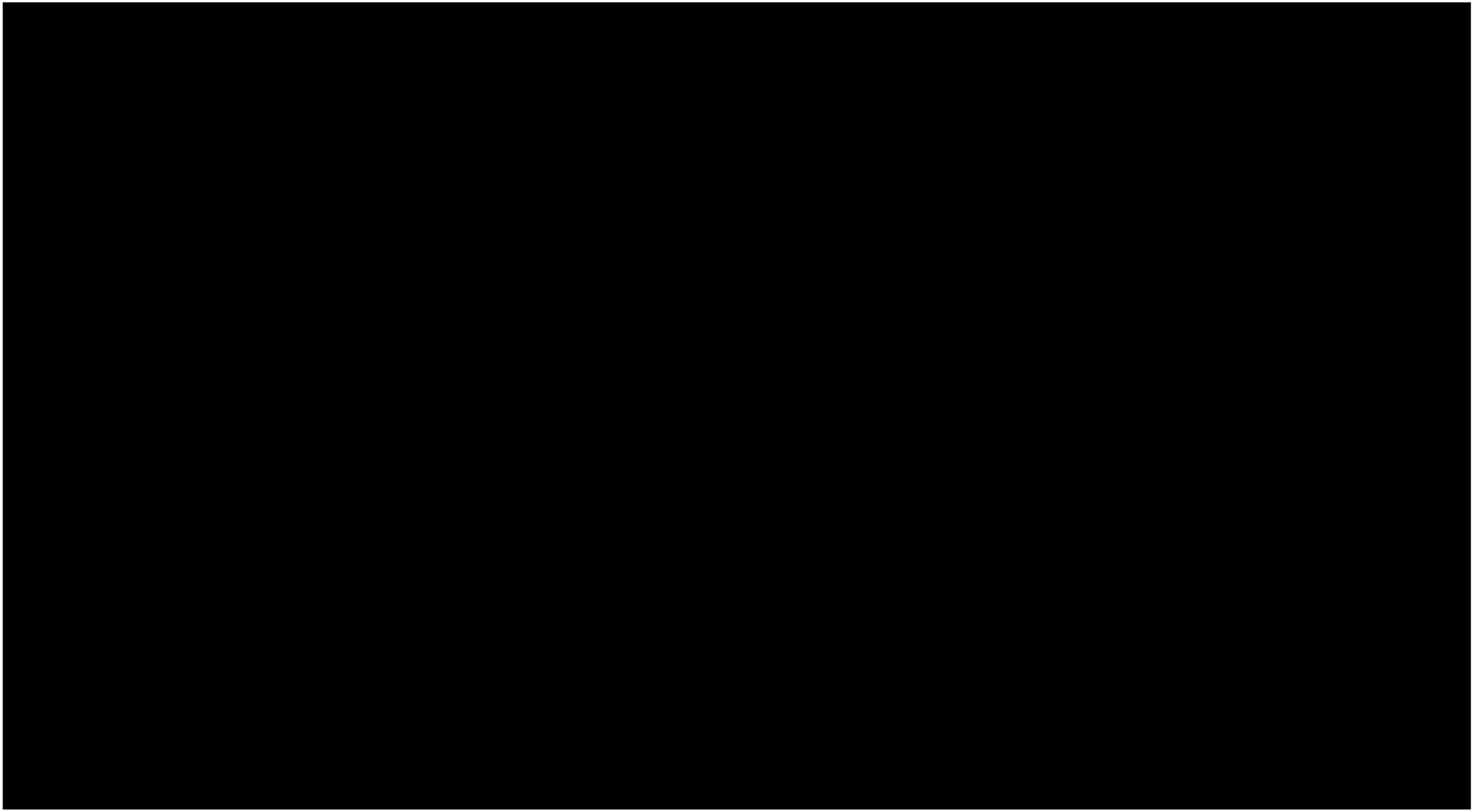
Ice Sports Facility Feasibility Study
Stage 2 – Demand Analysis

Prepared by Waypoint

Waypoint
MAKING MORE POSSIBLE

The Task



Introduction

Following the completion of the Stage 1 – Pre-feasibility Study, Waypoint was engaged to progress to Stage 2 – Demand Analysis. Given limited available data obtained during Stage 1 and the insights from existing operators regarding the importance of casual/public skate market, Waypoint recommended the commissioning of a public survey to gain further evidence regarding the general demand and likely usage of an ice sports facility.

Key tasks undertaken during this stage include:

- A survey of 1,000 Tasmanians aged 16+ regarding likely usage and interest in an ice sports facility.
- A review of demographic data and population projections that may influence usage of an ice sports facility.
- Utilising survey results and population projections to model annual visitation scenarios.
- Undertaking a market and competitor analysis.
- Undertaking a facility optimisation analysis including the provision of an optimal facility layout and usage schedule in consultation with an existing facility operator.

This report outlines the results of the above, providing data and evidence outlining the potential demand, likely annual visitation and a proposed usage schedule to support facility optimisation and viability.

Tasmania – A Snapshot

The most recent data from the ABS reports **the State's population in the year ending June 2022 was 571,517,** with approx. 83.4% of the population aged 15 and over.

Households made up of couples and children – 24%

Projected Population 2032/33 – 646,000

In 2021/22, household expenditure on Recreation and Culture was $8,412, an increase of $500 from 2016/17. **This accounts for approx. 8.3% income expenditure.**

Key Insights:

- Population is set to grow by approx. 75,000 people by 2032/33.
- Tasmania's population is ageing, with the highest median age (42) of all Australian States and Territories.
- Participation in sports and recreation amongst children is the lowest in the country.
- Adults participating through an organisation or venue is the lowest in the country.
- Tasmanians spend considerably less on recreation and culture than the rest of Australia.

Market & Competitor Analysis

- Tasmania does not currently have an active ice sports facility, therefore there is no direct competing facility.
- Interstate rinks, particularly those in Victoria, are not considered to be competing facilities given cost and time associated to travel to these facilities. They are being utilised to a limited extent to provide continued support to Tasmanian ice sports participants, in the absence of a local facility.
- Inline Hockey is a complimentary offering to Ice Hockey, developed overseas as a means of providing Ice Hockey participants with an opportunity to continue Hockey in the off-season.
- Woody's Skate and Play in Glenorchy has approx. 450 active players, 50 of whom who had transitioned across from Ice Hockey at the closure of the Glenorchy rink.
- Following consultation with Inline Hockey Tasmania, the following impacts to Inline Hockey were considered to be likely in the event a new ice sports facility was built:
    - Likely to see a temporary reduction in participation in the short-term.
    - Longer-term, it is envisaged that an ice sports facility would be beneficial, with Inline Hockey acting as a natural pathway into Ice Hockey.
- An ice sports facility would be in direct competition with other Tasmanian sport and recreation offerings, hence a quantitative research survey was undertaken to understand likely visitation and participation.

Market & Competitor Analysis – Case Study

Insight – Hunter Ice Skating Stadium

- Single rink (Olympic size) facility located in Newcastle.
- Constructed in 2000 [redacted].
- Similar market size:
  - Greater Hobart Population: 252,693.
  - Greater Newcastle Population: 171,316.
- [redacted].
- [redacted].
- [redacted]
- [redacted].
- Ice sports are allocated times outside of peak public skating.
- Market is predominantly within 15-20minutes of the centre but does attract some clientele from up to 2 hours away.
- [redacted]
- [redacted].
- [redacted].

HUNTER ICE SKATING STADIUM

Demand Analysis – Survey Findings

In order to obtain the necessary data to gather the required insights from Tasmanian residents, aged 16 years and over, and residents in all regions of the State, Waypoint commissioned EMRS to design and implement a survey with a target sample size of 1,000 respondents.

Purpose and Objectives of the Research

Quantitative Research

Specifically, the research aimed to determine:

- Likelihood of use of a new ice-rink
- Usage of and travel to an ice-rink facility
- Cost of the ice-rink facility
- Community benefits
- Profile of the respondents, segmented by:
  - Age
  - Gender
  - Regional cluster
    - Rural and regional (restricted to the Huon Valley, Derwent Valley, Southern Midlands, and Glamorgan-Spring Bay)
    - Urban regional
    - Urban fringe
    - Urban city

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The sample size of 1,000 respondents provides results at a 95% confidence level, with the sample considered sufficiently large enough to ensure that the results are robust and reliable.

Demand Analysis – Survey Findings

The Sample Profile – Key Demographics

Table 1 – Age of respondents

Age	%	n
Total	***100%***	***1,000***
16 to 34 years	29%	292
35 to 54 years	29%	287
55+	**42%**	421
I'd prefer not to say	-	0

Table 2 – Gender identity of respondents

Gender	%	n
Total	***100%***	***1,000***
Male	**42%**	420
Female	**57%**	570
Non-binary	1%	7
Other	0%	2
I'd prefer not to say	0%	1

Table 3 – Regional cluster of respondents

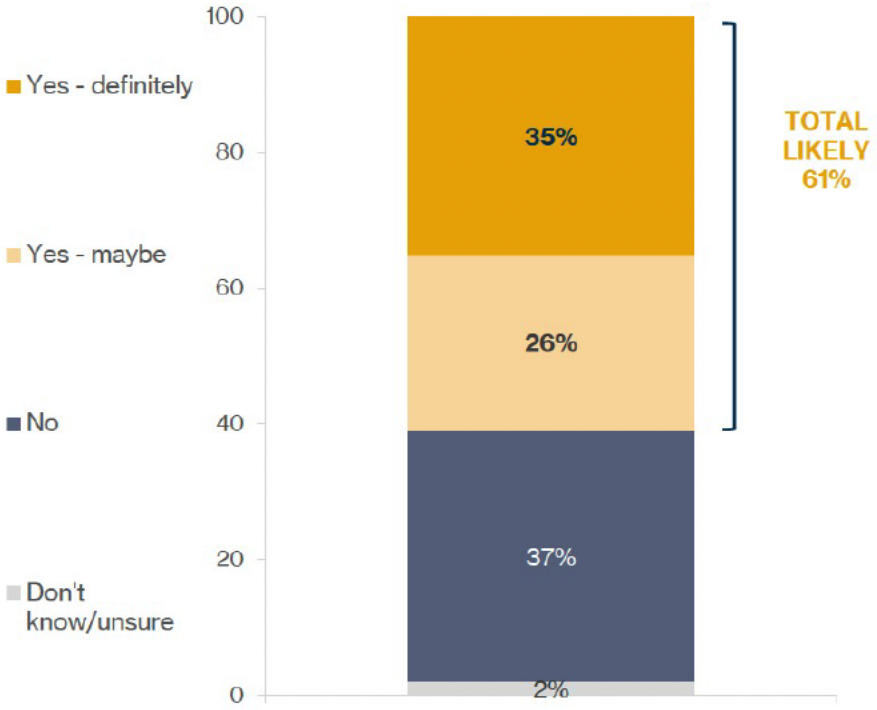
Regional cluster	%	n
Total	***100%***	***1,000***
Rural and Regional	8%	84
Urban Regional	19%	190
Urban Fringe	**42%**	420
Urban City	**31%**	306

The percentage figures tabled here are unweighted. Elsewhere in the report, they have been weighted to reflect the gender and age profile of the population, and the proportion of the sample that was sought regionally.

Demand Analysis – Survey Findings

Likelihood of Using or Visiting a New Rink

Chart 2 – Likelihood of using a new rink
(Percentage of all respondents, n=1,000)



61% of the respondents expressed a likelihood of using a new ice-rink facility, 35% of whom stated they would definitely do so. About two-fifths of the respondents stated "no" (37%).

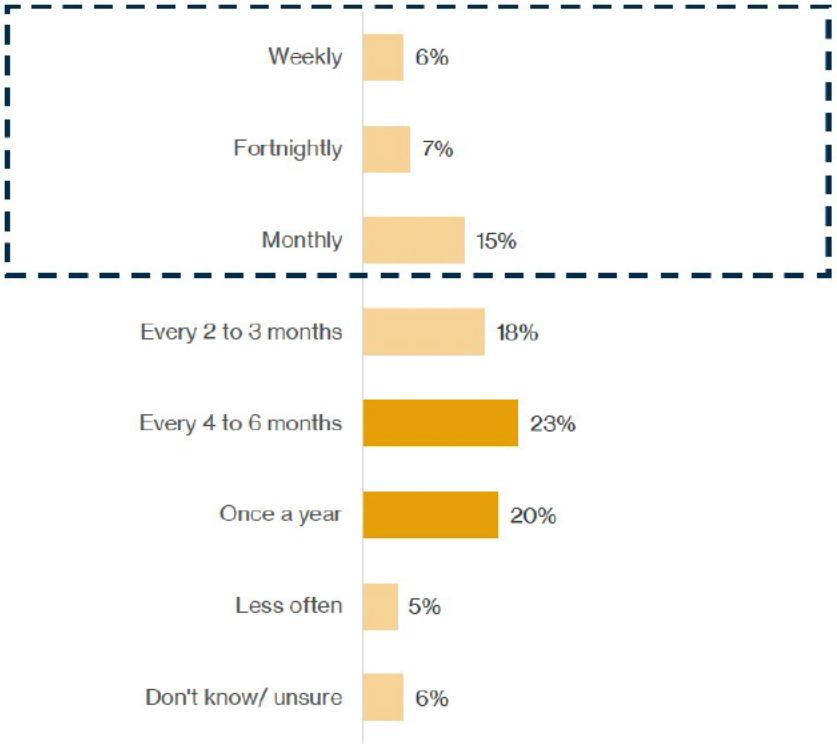
Subgroup analysis

Subgroup	Significant variations noted
Age	Respondents aged 16 to 34 years were significantly more likely to state: • Yes – definitely (52%, n=159) • Yes – maybe (35%, n=97) And less likely to state: • No (11%, n=30) Respondents aged 35 to 54 years were significantly less likely to state: • No (30%, n=88) Respondents aged 55+ years were significantly less likely to state: • Yes – definitely (18% n=75) • Yes – maybe (18%, n=77) And more likely to state: • No (64%, n=267)
Gender	Male respondents were significantly more likely to state: • Yes – maybe (30%, n=118) And less likely to state: • Yes – definitely (29%, n=110) Female respondents were significantly more likely to state: • Yes – definitely (41%, n=236) And less likely to state: • Yes – maybe (22%, n=128)
Region	No significant variations

Demand Analysis – Survey Findings

Frequency of Use or Visits

Chart 3 – Frequency of visits
(Percentage of respondents who would definitely or may visit the new ice-rink facility, n=599)



More than one quarter of respondents (28%) were likely to use the ice-rink facility relatively frequently, on a weekly up to a monthly basis. 41% of respondents would visit every 2 to 6 months. 20% stated once a year and 5% less often.

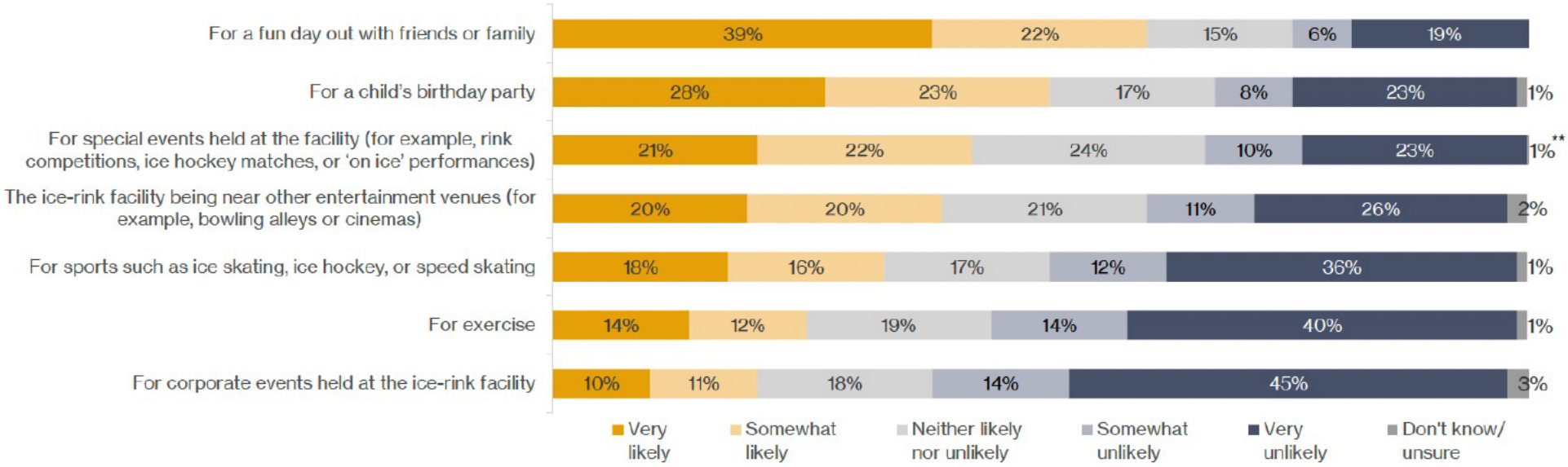
Subgroup analysis

Subgroup	Significant variations noted
Age	No significant variations
Gender	No significant variations
Region	No significant variations

Demand Analysis – Survey Findings

Usage of an Ice Rink Facility

Chart 8 – Usage of an ice-rink facility
(Percentage of all respondents, n=1,000)*

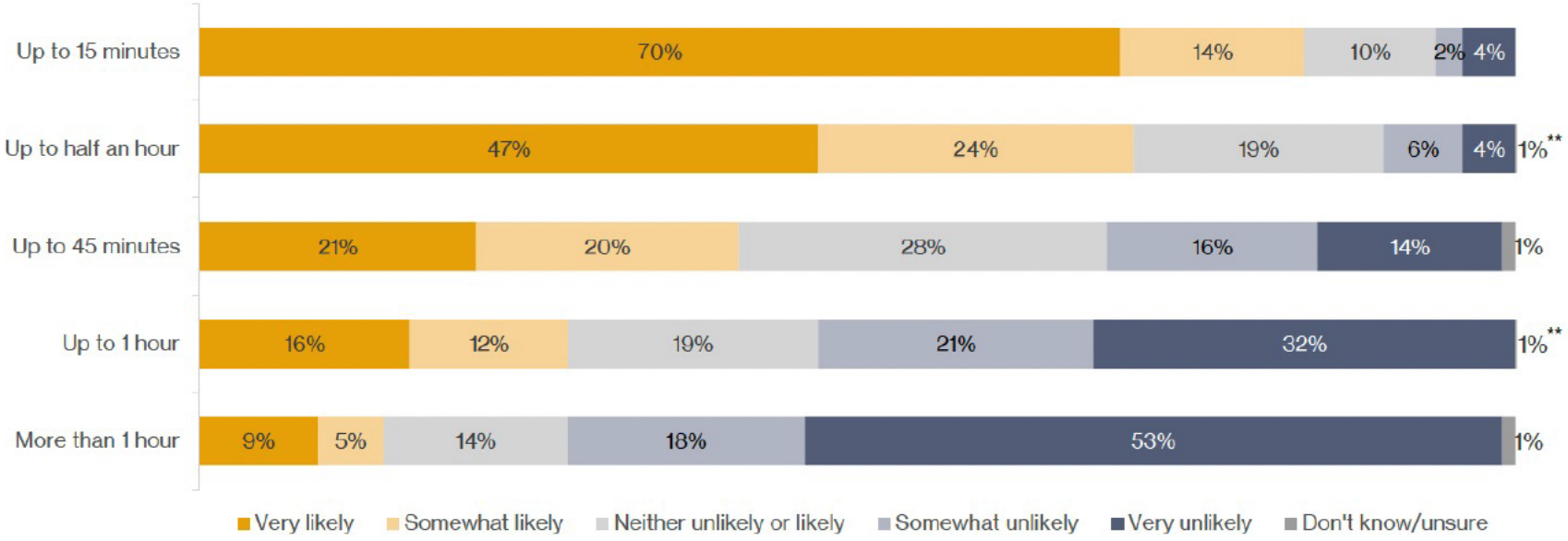


In total, 60% of the respondents were likely to use an ice-rink facility for a fun day out with friends or family, while 51% would consider it for a child's birthday party. Respondents were relatively unlikely to use the facility for exercise (only 26% likely) or corporate events (20%).

Demand Analysis – Survey Findings

Travel Time to the Facility

Chart 10 – Travel time to the facility
(Percentage of all respondents, n=1,000)*

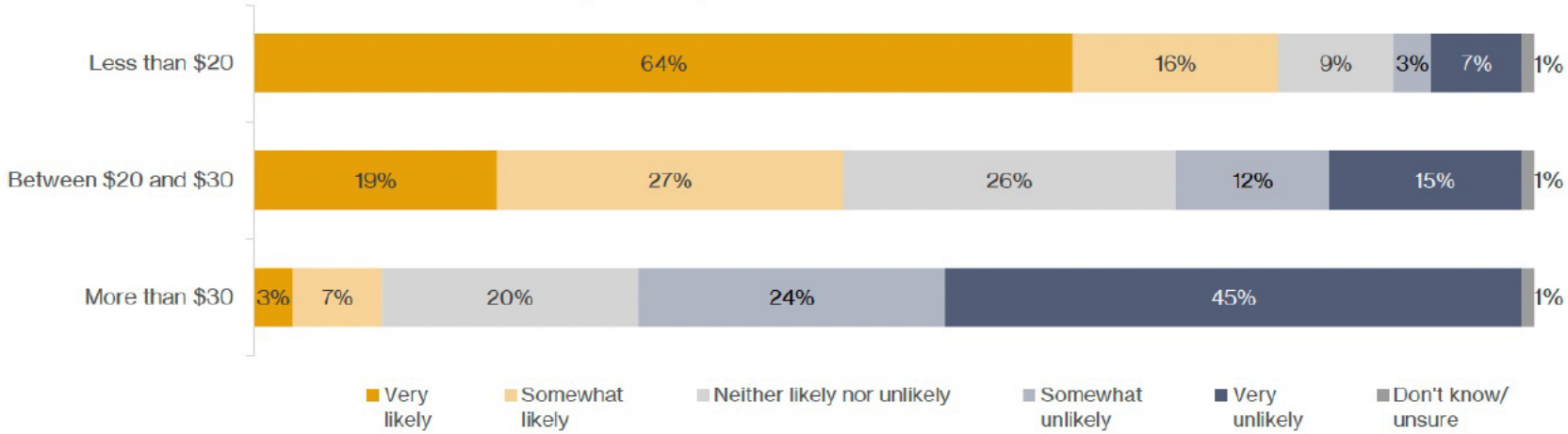


70% of respondents said they would be very likely to go to the ice-rink facility if the travel time was within 15 minutes, while close to one half (47%) said they would be very likely to accept a travel time of up to half an hour. Over one half of the respondents (53%) said they would be very unlikely to go to the ice-rink facility if the travel time was more than 1 hour.

Demand Analysis – Survey Findings

Cost to Access the Facility

Chart 13 – Cost of facility – price points
(Percentage of all respondents, n=1,000)*



In total, 80% of respondents stated that they would be likely to use the ice-rink facility if the entry fee was less than $20, with 64% stating they would be very likely. Only 10% said they would be unlikely.

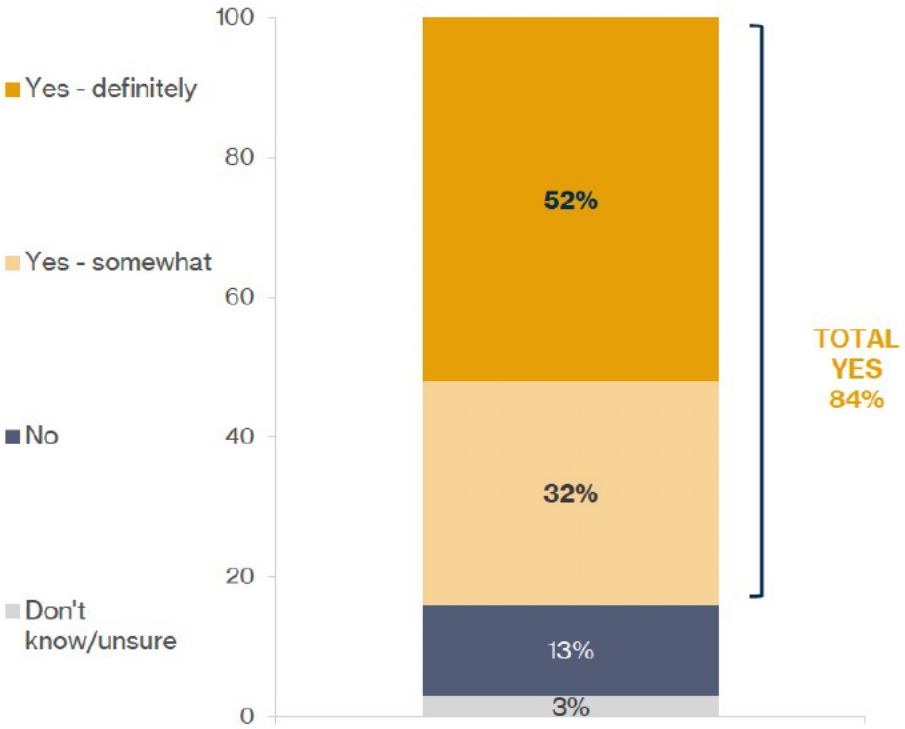
46% of respondents would be likely to visit with an entry fee between $20 and $30.

A cost of entry of more than $30 proved to be a significant deterrent, with 69% of respondents in total stating they would be unlikely to visit the ice-rink facility at this price point.

Demand Analysis – Survey Findings

Community Benefits

Chart 15 – Community benefits – overall beneficial to area
(Percentage of all respondents, n=1,000)



Positively, 84% of respondents thought that, overall, an ice-rink facility would be beneficial to their local area and community, with over one half indicating it definitely would be. Only 13% of respondents were of the view that there would be no benefits to the community.

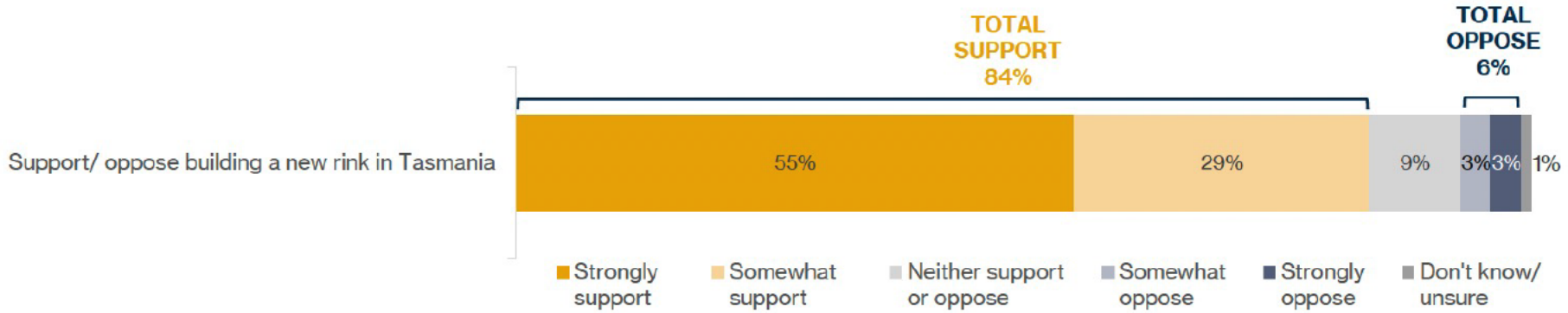
Subgroup analysis

Subgroup	Significant variations noted
Age	Respondents aged 16 to 34 years were significantly less likely to state: • No (4%, n=10) Respondents aged 55+ years were significantly more likely to state: • No (20%, n=83)
Gender	Male respondents were significantly more likely to state: • No (16%, n=75) And less likely to state: • Yes – definitely (46%, n=192) Female respondents were significantly more likely to state: • Yes – definitely (57%, n=327) And less likely to state: • No (10%, n=53)
Region	No significant variations

Demand Analysis – Survey Findings

Support / Oppose Building a New Rink in Tasmania

Chart 16 – Support/ oppose building a new rink in Tasmania
(Percentage of all respondents, n=1,000)



Overall, 84% of the respondents supported the building of a new ice-rink facility, with 55% showing strong support. Only 6% of the full sample opposed this proposal, while the remaining 10% of respondents in total were neutral or unsure.

Subgroup analysis

Subgroup	Significant variations noted
Age	Respondents aged 55+ years were significantly more likely to state: • Strongly oppose (5%, n=22)

Subgroup analysis

Subgroup	Significant variations noted
Gender	Male respondents were significantly less likely to state: • Strongly support (49%, n=207) Female respondents were significantly more likely to state: • Strongly support (60%, n=346)
Region	No significant variations

Demand Analysis – Survey Findings

Key Insights – Summary

- Overall, 61% of all respondents said they would likely use a new ice rink.
- 28% of respondents are likely to use the facility relatively frequently (weekly – monthly basis).
- 60% of all respondents perceived the ice rink as a place for recreational activity, with 34% of respondents perceiving the rink as a place to participate in ice sports.
- 71% of respondents would be willing to travel up to half an hour to visit the facility, with 84% of respondents likely to visit if within 15 minutes of their residence.
- Cost of entry is a major factor, with any price below $20 being the most favourable with respondents (64% likely to visit the facility at this price point).
- Almost four in five respondents believe that an ice rink facility would offer a wide range of activities and events for the local area (79%) and would enable locals to engage in winter sports (77%).
- Overall, 84% of respondents would support the development of a new ice rink facility.

Implications for Facility Utilisation

Based on survey findings and utilising population data, Waypoint has been able to model annual visitation numbers for a proposed facility. Key assumptions of this modelling include:

- The facility is based in the Greater Hobart area
- Population data from the LGAs that are within an approximate 30min drive of Hobart have been included.
- Only population data of the aged 16+ has been utilised to correspond with the survey sample. It is acknowledged that those aged below 16 will be key users of any facility.

Greater Hobart Population Data - Ages 16+

Total Population 16+	**185903**									
		Liklihood of using/visiting an ice rink facility		Frequency of using/visiting an ice rink facility (weekly - monthly)		Sensitivity Analysis		Annual Visitation Modelling		
Hobart	47203	29%	13689	28%	3833					
Brighton	14415	33%	4757	28%	1332					
Glenorchy	41557	39%	16207	38%	6159	-20%	20%	Low (14,838 per month)	Med (18,547 per month)	High (22,256 per month)
Clarence	50342	37%	18627	28%	5215					
Kingborough	32386	31%	10040	20%	2008					
Total	**185903**		**63319**		**18547**	**14838**	**22256**	**178051**	**222563**	**267076**

- It is acknowledged that the 'Tasmanian Ice Sports Arena Options Paper and Business Case' modelled visitation scenarios up to 125,000. Based on the survey data this appears conservative but can be adopted as a 'low' visitation scenario for future modelling.
- The above modelling indicates strong likely demand for the facility and compares favorably with annual visitation at other single rink facilities [redacted]

Usage Schedule

Based on consultation with existing venue operators and the results of the demand analysis, an indicative usage schedule has been developed as per below:

INDICATIVE SCHEDULE						
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
FREESTYLE SKATING 6am-9am	FREESTYLE SKATING 6am-9am	STICK N PUCK 7am-9am	FREESTYLE SKATING 6am-9am	FREESTYLE SKATING 6am-9am	FREESTYLE SKATING 6am-9am	
				COFFEE CLUB & PLAYGROUP 9.15am-11.15am	SKATE SCHOOL 9.15am- 11.15am	STICK N PUCK 9.15am-11.15am
					PUBLIC SESSION 11.30am-4.00PM	PUBLIC SESSION 11.30am-4.00PM
PUBLIC SESSION 1.00pm-5.00pm	PUBLIC SESSION 1.00pm-5.00pm	FREESTYLE SKATING 3.15pm-5.15pm	PUBLIC SESSION 1.00pm-5.00pm	PUBLIC SESSION 1.00pm-5.00pm	ICE HOCKEY SCRIMMAGE 4.15pm-5.45pm	PRIVATE HIRE 4.15pm-6.15pm
SKATE SCHOOL 5.15pm- 7.15pm		LEARN TO HOCKEY JR & SR 5.30pm-7.45pm	FREESTYLE SKATING 5.15pm-7.15pm	PRIVATE HIRE 5.30pm-7.00pm	PRIVATE HIRE 6.00pm-7.00pm	
IN HOUSE HOCKEY LEAGUE 7.30pm-9.45pm	$10 TUESDAY $5 kids 7.00pm-9.30pm	ICE HOCKEY SCRIMMAGE 8.00pm-9.30pm	SPEED SKATING 7.30pm-9.30pm	PUBLIC SESSION 7.30pm-10.00pm	PUBLIC SESSION 7.30pm-10.00pm	
School hours would be available for School and University groups						

Key features/insights:

- General operating hours from 6am – 10pm most days.
- Prominence provided to public skate sessions as key revenue generator, with a reduced-price offering provided on a Tuesday evening.
- Up to 112 'ice hours' provided per week.
- Off-peak times during weekday's to be populated with school use which would be a key focus of any facility operator.
- Proposal is to attract a mass audience to the facility which in turn generates additional interest in various ice sports offerings.
- Skate school is an activity where those learning to skate often transition to involvement in a sport (i.e., figure skating or ice hockey), particularly with the right marketing/connections.

Facility Optimisation Analysis

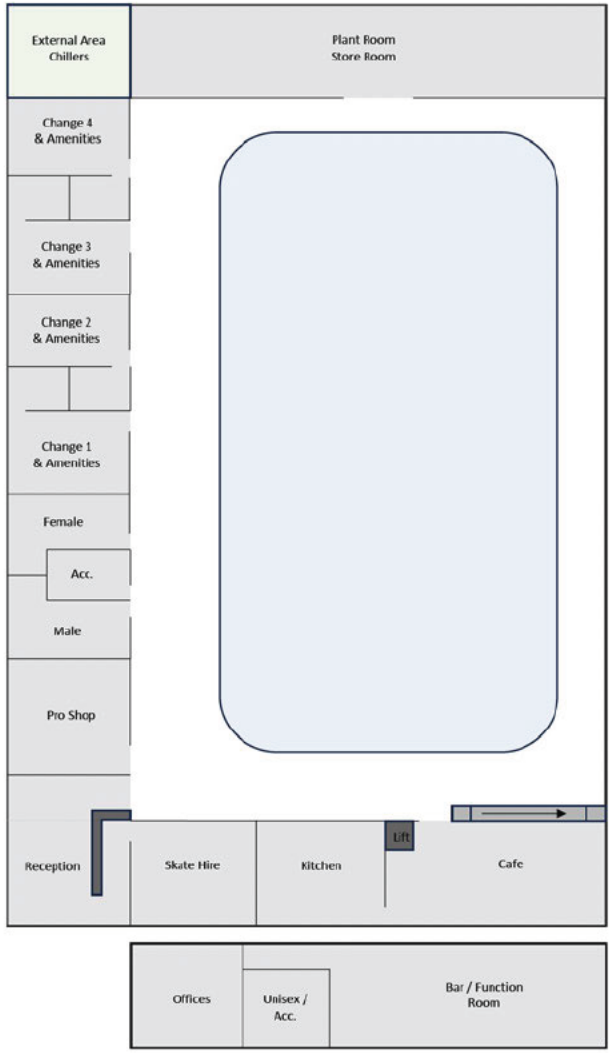
Following the results from the demand analysis survey, the following facility components and area schedules are recommended to deliver a sustainable “Minimum Viable Product”:

Facility Components	Minimum Viable Product	Area Schedule
No. of sheets (Olympic Size)	1	1,800 sqm
No. of change rooms	4	450 sqm
Reception	✓	100 sqm
Skate Rental	✓	150 sqm
Pro Shop	✓	150 sqm
Storage – Plant Room	✓	400 sqm
Bar – Including Function Area	✓	300 sqm
Offices – Open Plan	✓	50 sqm
Perimeter – Ice Rink Circulation	✓	600 sqm
Cafe	✓	200 sqm
Outdoor Plant - Chillers	✓	100 sqm
Total sqm		**4,300 sqm**

The total area required to deliver a single level ’Minimum Viable Product’ facility is approx. 4000sqm – 5000sqm. Note: This does NOT include provision for Car Parking.

While the core business will be on ice activities, the importance of peripheral businesses of, café, bar, pro shop etc. assists the viability of the business as a whole. The areas identified in the table above allows future proofing for growth, which would be highly anticipated.

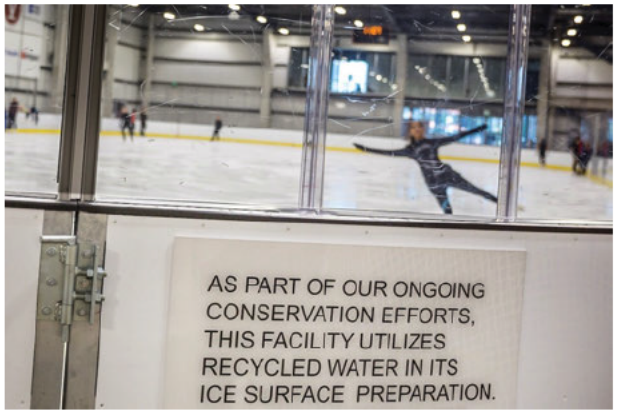
Optimal Facility Layout

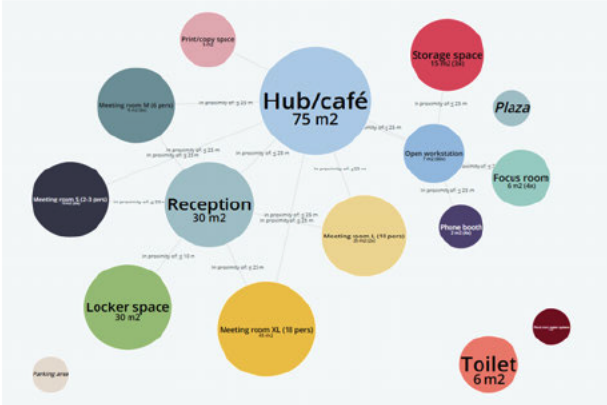


Bar / Function Room and Offices positioned on level 2 over Café, Kitchen and Skate Hire.

Facility Optimisation Analysis

- Environmentally Sustainable Design will aid in the operational performance of the business.
  - Water can be captured then fed into tanks and in turn, filtered through a system to reuse for ice resurfacing, toilet flushing etc.
  - Solar and/or battery energy can reduce power usage significantly and is considered mandatory in any development given the energy intensive nature of such facilities.
- The functional layout of the building can aid in maximising the operational output of the business.
  - Placing the skate hire room adjacent to front reception will allow one staff member to operate both tasks on quieter days (during the week), thereby reducing staffing costs.
  - Ice technicians should be proficient in maintenance through to cleaning so contractor costs are kept to a minimum; this is common in ice rinks the world over.
  - Circulation around the rink should allow adequate space for spectator bleacher seating to be introduced in the future.





Complimentary/Secondary Use

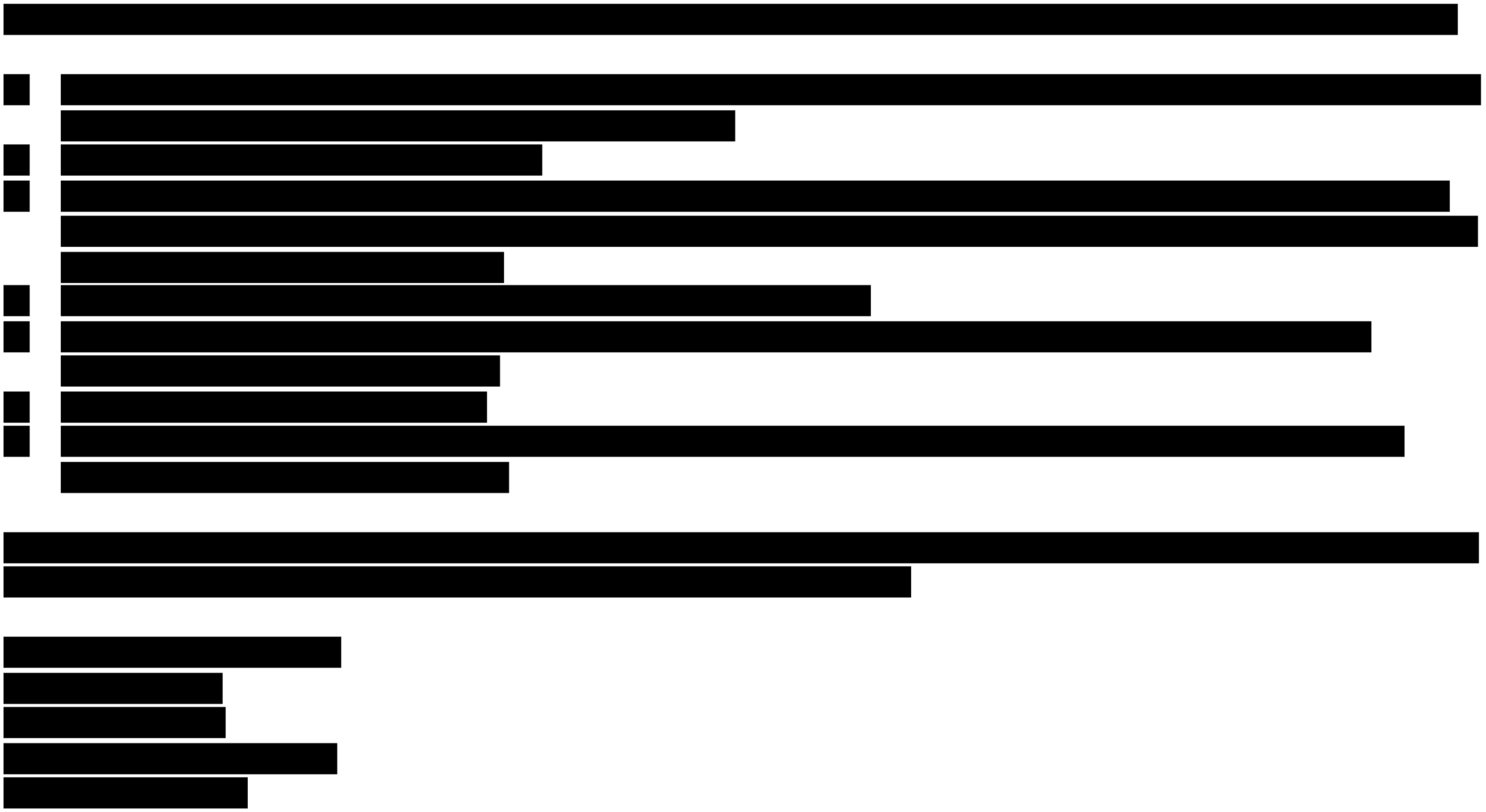
Ice Sports Facilities can lend themselves to a variety of complementary or secondary uses, particularly given a venue management model can be appropriately scaled to efficiently support an adjoining recreational facility. Potential options include:

- Rock climbing facility (as per proposed Canberra Arena facility).
- Multi-purpose hard court with potential for activities/sports including:
    - In-line hockey
    - Pickleball
    - Basketball
    - Netball
    - Futsal

The above can also complement the attraction of the school, holiday program and birthday party market.

Heat Exchange opportunities were identified within the 'Tasmanian Ice Sports Arena Options Paper and Business Case', where the heat generated from the ice facility can be utilised to support the heating of nearby public pools. Should the project progress to the next stage of analysis, which would include potential site location options, the ability to utilise a heat exchange opportunity can be considered amongst site selection criteria.

Next Steps



Appendix 1 – EMRS Survey

WAYPOINT

FACILITY FEASIBILITY STUDY 2023

QUANTITATIVE RESEARCH FINAL REPORT

Part of the C|T GROUP

May 2023

EMRS PROJECT ID 6267-23
REPORT VERSION: 2 (FINAL)
This report has been prepared by
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SECTION THREE – LIKELIHOOD OF USE OF A NEW ICE-RINK

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SECTION ONE
INTRODUCTION

INTRODUCTION:
BACKGROUND TO AND SCOPE OF THE RESEARCH

Background to the Research

In May 2022, Tasmania's only ice-skating rink closed down. According to initial analysis from the Department of State Growth, the closure directly affected over 200 Tasmanian athletes. In late 2022, the Tasmanian Government committed to funding a demand analysis study for an ice sports facility in Tasmania. This study was to gather feedback from the Tasmanian community regarding the potential demand for a new facility.

Scope of the Research

In order to gather the feedback, the leading sports facility advisory firm, Waypoint, commissioned EMRS to design and implement the collection of the necessary data via a quantitative research methodology.

The research was to gather the required insights from Tasmanian residents, aged 16 years and over, and resident in all regions of the state. The target sample size of successfully completed surveys was n=1,000.

The following report the presents the specifications for and full findings of the study.

INTRODUCTION:
PURPOSE AND OBJECTIVES OF THE RESEARCH

Purpose and Objectives of the Research

Quantitative Research

Specifically, the research aimed to determine:

- Likelihood of use of a new ice-rink
- Usage of and travel to an ice-rink facility
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- Profile of the respondents, segmented by:
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    - Rural and regional (restricted to the Huon Valley, Derwent Valley, Southern Midlands, and Glamorgan-Spring Bay)
    - Urban regional
    - Urban fringe
    - Urban city

INTRODUCTION: RESEARCH METHODOLOGY

The Research Methodology

Quantitative Research

In order to meet the informational objectives of the research brief, EMRS implemented a quantitative survey methodology utilising Computer Assisted Telephone Interviewing (CATI) as the primary method of data collection. EMRS offered the capacity to undertake this through its own in-house 75-seat call centre, ensuring high levels of interviewer monitoring and quality control.

The survey was originally designed to be approximately 7 minutes in length. The CATI fieldwork proved that it was longer in duration and, in consultation with Waypoint, it was agreed that the CATI method be supplemented by an equivalent online survey to ensure that the target sample size was reached without an increase in cost to the client.

The online survey was sent via email invitation to EMRS's large online Tasmanian Community Panel, with the link to the survey unique and secure. To achieve the desired and representative sample size, EMRS also partnered with the online panel firm CINT to fill any gaps in the data collection.

The research was conducted in the period between the 1st and 15th of May 2023.

In total, a sample of n=1,000 respondents completed the survey: n=750 via CATI and n=250 online. Overall results accurate to within ± 3.10 percentage points at the 95% confidence interval were obtained. The size of the sample is sufficiently large to ensure that the results are robust and reliable. Cross-tab analysis was utilised to further ensure robust and reliable results.

The survey was implemented according to ISO 20252:2019 standards, certificate number 888027.

INTRODUCTION: REPORTING ON THE RESULTS

Reporting on the Results

Where percentage figures do not sum to 100, an asterisked (*) comment explains whether it is due to rounding or the question allowing multiple responses. A dagger symbol (†) indicates where the sample size is small or variable and caution should be exercised in interpreting the results.

The following report presents the findings of the quantitative research, conducted among n=1,000 Tasmanians aged 16 years and over. The results have been presented predominantly in charts and tables format. Any statistically significant variations in the results across the population subgroups have been remarked upon in the commentary accompanying the charts and tables. In addition, table cells have been noted where a statistically significant variation in the results is evident.

Weighting has been applied to the results of this survey to ensure that they accurately reflect the demographic profile of the target population according to the gender, age and regional distribution as recorded in the most recent 2021 Australian Bureau of Statistics Census.

INTRODUCTION:
THE SAMPLE PROFILE – KEY DEMOGRAPHICS

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INTRODUCTION: QUOTAS AND WEIGHTING

Quotas and Weighting

In order to gain a sample representative of the Tasmanian population, quotas were put in place for gender, age, and regional distribution type. Where the quotas were not achieved, weighting was applied to the results to ensure they were accurate in reflecting the demographic profile of the population. As the collected data set rarely mirrors the exact age/ gender distribution of the regions, in order to correct for this, the following weightings were applied:

Table 4 – Quotas and weighting

Age	n	% (Unweighted)	% (Weighted)	Weights
16 to 34 years	292	29%	31%	1.07
35 to 54 years	287	29%	30%	1.04
55+	421	**42%**	39%	0.93
I'd prefer not to say	-	-	-	N/A
Gender	**n**	**% (Unweighted)**	**% (Weighted)**	**Weights**
Male	420	**42%**	**48%**	1.14
Female	570	**57%**	**51%**	0.90
Non-binary	7	1%	1%	1.00
Other	2	0%	0%	1.00
I'd prefer not to say	1	0%	0%	1.00
Region	**n**	**% (Unweighted)**	**% (Weighted)***	**Weights**
Rural and Regional	84	8%	8%	1.01
Urban Regional	190	19%	19%	1.00
Urban Fringe	420	**42%**	**42%**	1.00
Urban City	306	**31%**	**30%**	1.00
TOTAL	**1,000**	**100%**	**100%**	**-**

* Percentages do not sum to 100 due to rounding.

INTRODUCTION: ADDITIONAL DEMOGRAPHICS (1)

Additional Demographics

The tables which follow (pp.13-15) present the additional required segmentation of the sample by disability; and the presence, number and ages of children in the household. There was no weighting applied to the results for these population segments.

Table 5 – Respondents with a disability

Disability	n	%*
Yes	118	12%
No	876	**88%**
Prefer not to say	6	1%
TOTAL	**1,000**	**100%**

Table 6 – Respondents with children under 18

Living with children under 18	n	%
Yes	294	29%
No	705	**71%**
Prefer not to say	1	0%
TOTAL	**1,000**	**100%**

Table 7 – Number of children in the household

Number of children in the household	n**	%
1	103	**35%**
2	121	**41%**
3	51	**17%**
4	11	4%
5	5	2%
6	2	1%
7	1	0%
Other	0	-
Prefer not to say	0	-
TOTAL	**294**	**100%**

** The base does not total to 1,000 because only those who had children in the household answered this question.

* Percentages do not sum to 100 due to rounding.

INTRODUCTION: ADDITIONAL DEMOGRAPHICS (2)

Additional Demographics (cont'd.)

Table 8 – Ages of children in the household

Ages of children in the household	n**	%*
0 to less than 1 year	23	8%
1 year to less than 2 years	37	13%
2 years to less than 5 years	71	**24%**
5 years to less than 10 years	101	**34%**
10 years to less than 15 years	106	**36%**
15 years to less than 18 years	88	**30%**
Other	3	1%
Prefer not to say	5	2%
TOTAL	**294**	**100%**

* Percentages do not sum to 100 due to multiple responses.

** The base does not total to 1,000 because only those who had children in the household answered this question.

Table 9 – Local Government Area

LGA residency	n	%*
Brighton	27	3%
Burnie	47	5%
Central Coast	37	4%
Clarence	135	14%
Derwent Valley	26	3%
Devonport	53	5%
Glamorgan Spring Bay	6	1%
Glenorchy	129	13%
Hobart	174	17%
Huon Valley	44	4%
Kingborough	110	11%
Launceston	132	13%
Sorell	26	3%
Southern Midlands	8	1%
West Tamar	46	5%
TOTAL	**1,000**	**100%**

* Percentages do not sum to 100 due to rounding.

SECTION TWO
KEY INSIGHTS

KEY INSIGHTS: SUMMARY

- Overall, close to two in three of all respondents (65% in total) said they visit an urban centre on a weekly basis, and 61% stated that they are likely to use a new ice-rink facility. 28% of respondents are likely to use the facility relatively frequently, on a weekly to monthly basis. In addition, other household members (such as children, other family members, partner/spouse) are potentially also interested in an ice-rink facility (65%).

- 60% of all respondents perceived an ice-rink facility as a place for fun with friends, family and children, with about one half considering it for hosting a birthday party for their children (51%). However, respondents were less likely to associate the facility with exercise (26%) and corporate events (20%). The most preferrable travel time to the facility, prompting likely visitation, would be within 15 minutes (84%) to up to half an hour (71%). Likelihood of travelling to an ice-rink facility dropped significantly were it to take more than 1 hour (14%). When respondents are travelling to the surrounding area for other purposes, 66% said they would also be likely to visit the facility, with 30% indicating they would 'definitely' do so. After being presented with a range of visiting scenarios, 30% of respondents who had initially been unlikely to use or visit an ice-rink facility reconsidered doing so – a not insignificant proportion.

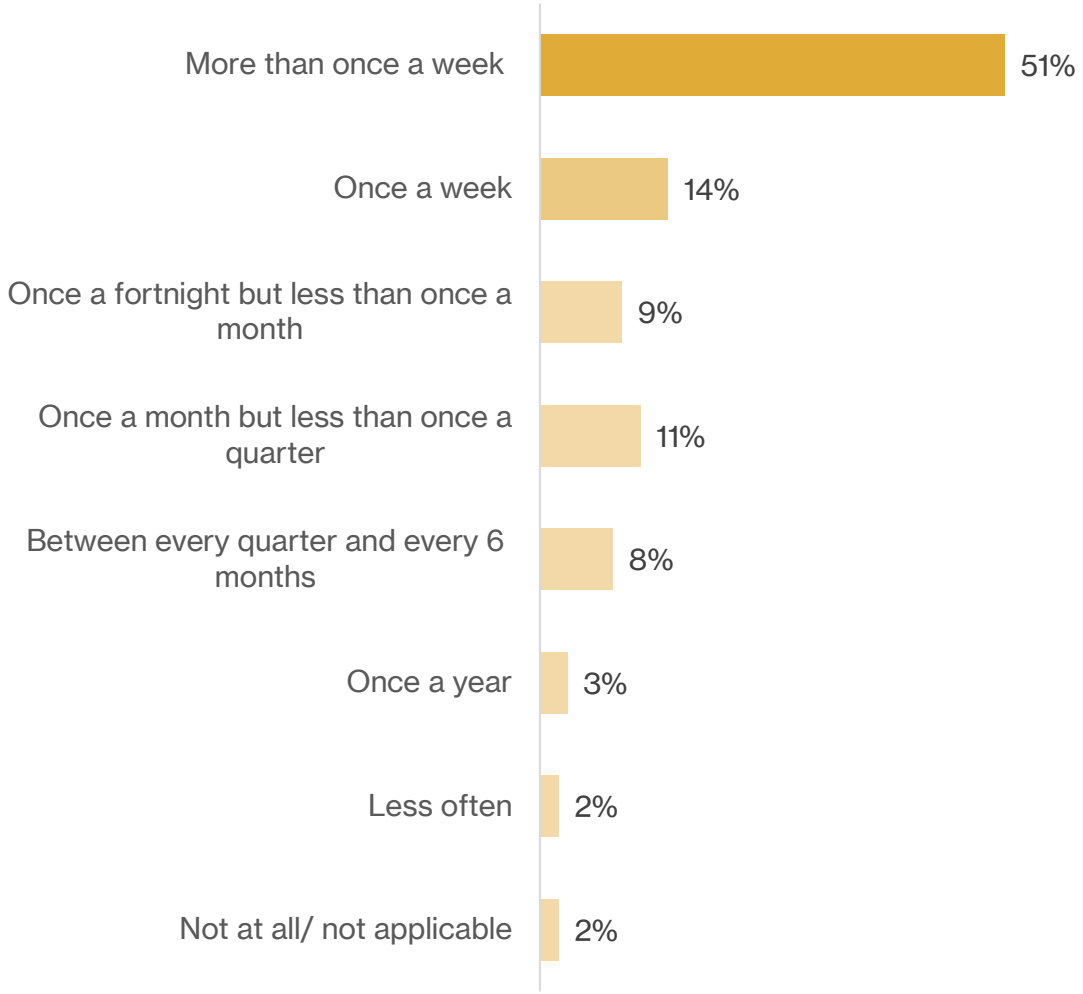
- Cost of entry is a major factor to visiting an ice-rink facility (for 63%), while 23% stated that it does not matter to them. Any price below $20 would be the most favourable to respondents, with 64% stating that they would be 'very likely' to visit the facility at this price point. Close to one half of respondents (46% in total) still accept a cost of entry between $20 and $30 (27% 'somewhat likely' and 19% 'very likely' to visit). However, any price above $30 is unfavourable, 45% of respondents stating they would be 'very unlikely' to visit.

- Different potential community benefits of an ice-rink facility were presented to respondents, and the responses were generally very positive. Almost four in five believe that an ice-rink facility would offer a wider range of activities and events for the local area (79%) and would enable locals to engage in winter sports (77%). From regression analysis, these two benefits also proved to be the most influential messages to gain public support for building an ice-rink facility. All other specified benefits prompted majority agreement in a range from 56% up to 79%. As to possible negatives of the ice-rink facility, while around one in three respondents agreed that the money should be put to other more important things locally (35%) and they did not see how the ice-rink would cater to the interests of the wider community (32%), building a new ice-rink facility still gained 84% agreement that, overall, it would be beneficial to the local area, and majority support of 84%.

SECTION THREE
LIKELIHOOD OF USE OF A NEW ICE-RINK

FREQUENCY OF TRAVEL TO AN URBAN CENTRE

Chart 1 – Frequency of travel to an urban centre
(Percentage of all respondents, n=1,000)



Over half of the respondents travel to an urban centre on a weekly basis either more than once a week (51%) or once a week (14%). In total, 28% of respondents visit an urban centre on a fortnightly to a semi-annually basis. 3% stated once a year and 2% stated less often.

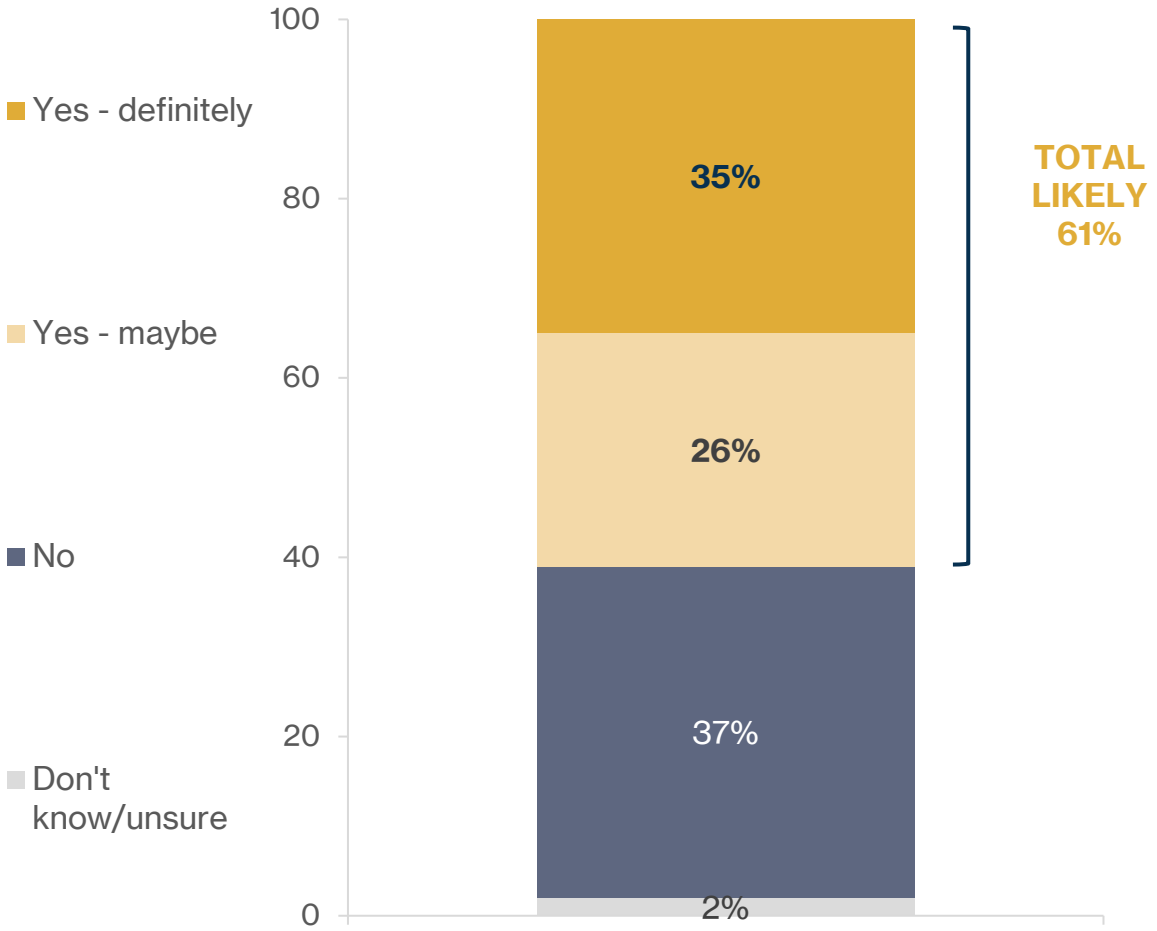
Subgroup analysis

Subgroup	Significant variations noted
Age	Respondents aged 35 to 54 years were significantly more likely to visit the urban centre: • More than once a week (61%, n=179) Respondents aged 55+ years were significantly less likely to visit the urban centre: • More than once a week (44%, n=187)
Gender	No significant variations
Region	Respondents in Rural and Regional were significantly more likely to visit the urban centre: • Once a fortnight but to less than once a month (24%, n=20) Respondents in Urban Regional were significantly more likely to visit the urban centre: • More than once a week (39%, n=75) • Once a month to less than once a fortnight (18%, n=33) Respondents in Urban City were significantly more likely to visit the urban centre: • More than once a week (61%, n=189) And less likely to visit the urban centre: • Once a week (9%, n=27)

Q. How often do you currently travel to a major urban centre in Tasmania – for example, Hobart, Launceston, Devonport, or Burnie?

LIKELIHOOD OF USING OR VISITING A NEW RINK

Chart 2 – Likelihood of using a new rink
(Percentage of all respondents, n=1,000)



61% of the respondents expressed a likelihood of using a new ice-rink facility, 35% of whom stated they would definitely do so. About two-fifths of the respondents stated "no" (37%).

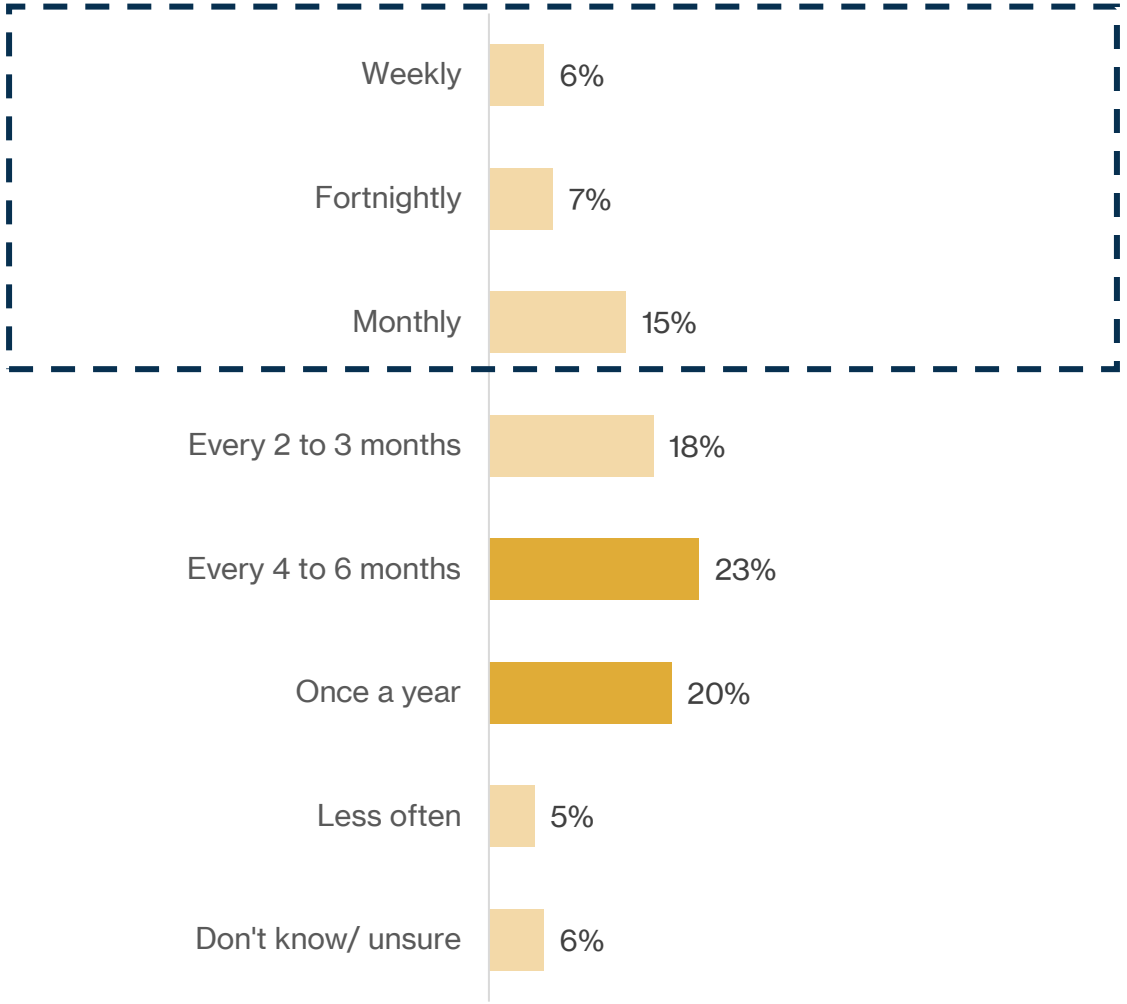
Subgroup analysis

Subgroup	Significant variations noted
Age	Respondents aged 16 to 34 years were significantly more likely to state: • Yes – definitely (52%, n=159) • Yes – maybe (35%, n=97) And less likely to state: • No (11%, n=30) Respondents aged 35 to 54 years were significantly less likely to state: • No (30%, n=88) Respondents aged 55+ years were significantly less likely to state: • Yes – definitely (18% n=75) • Yes – maybe (18%, n=77) And more likely to state: • No (64%, n=267)
Gender	Male respondents were significantly more likely to state: • Yes – maybe (30%, n=118) And less likely to state: • Yes – definitely (29%, n=110) Female respondents were significantly more likely to state: • Yes – definitely (41%, n=236) And less likely to state: • Yes – maybe (22%, n=128)
Region	No significant variations

Q. If a new ice-rink facility was built in Tasmania, would you be likely to use or visit it?

FREQUENCY OF USE OR VISITS

Chart 3 – Frequency of visits
(Percentage of respondents who would definitely or may visit the new ice-rink facility, n=599)



Q. Approximately, how often would you be likely to use or visit the ice-rink facility?

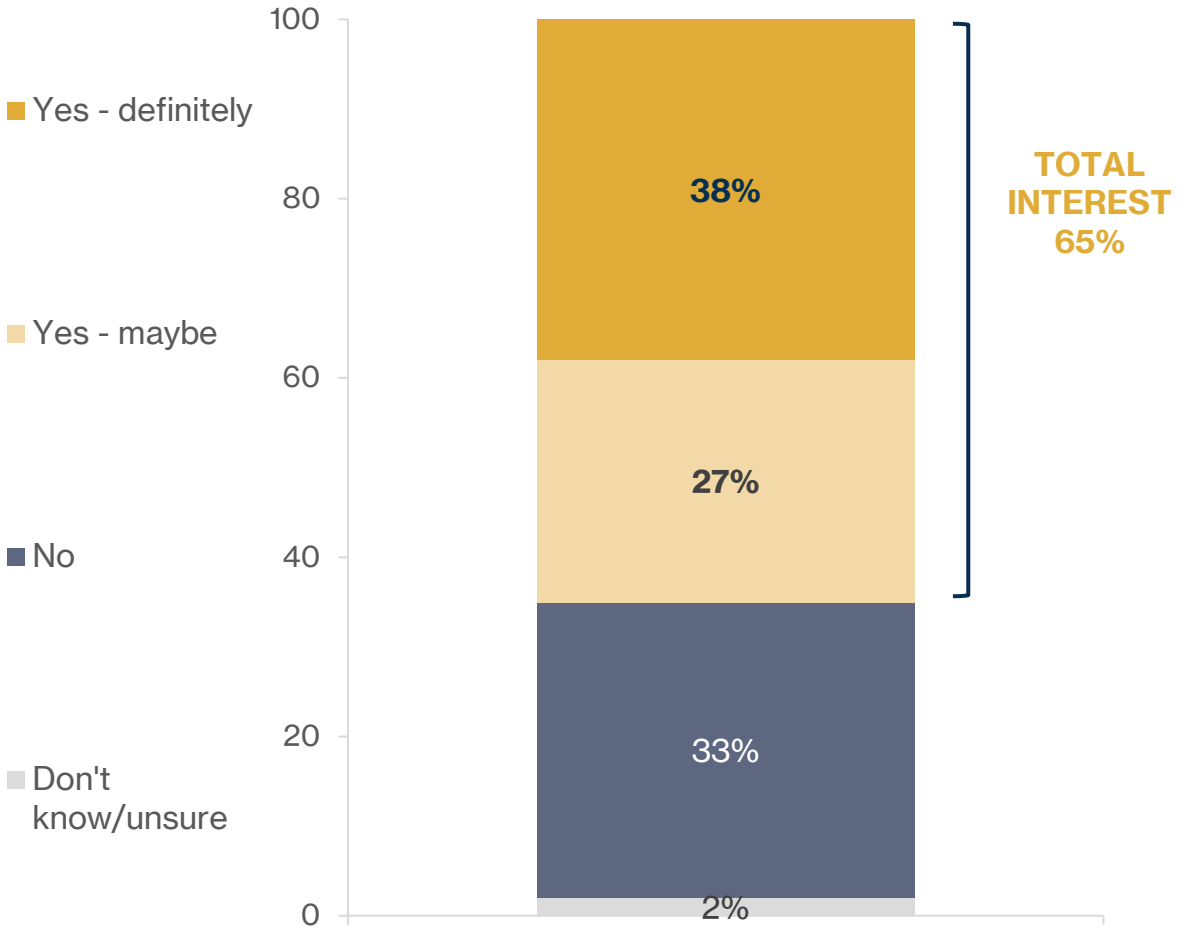
More than one quarter of respondents (28%) were likely to use the ice-rink facility relatively frequently, on a weekly up to a monthly basis. 41% of respondents would visit every 2 to 6 months. 20% stated once a year and 5% less often.

Subgroup analysis

Subgroup	Significant variations noted
Age	No significant variations
Gender	No significant variations
Region	No significant variations

POTENTIAL INTEREST FROM OTHERS IN THE HOUSEHOLD

Chart 4 – Potential interest from others in the household
(Percentage of all respondents, n=1,000)



65% of respondents stated that other members from their households would potentially be interested in using or visiting an ice-rink facility, while 33% stated they would not be.

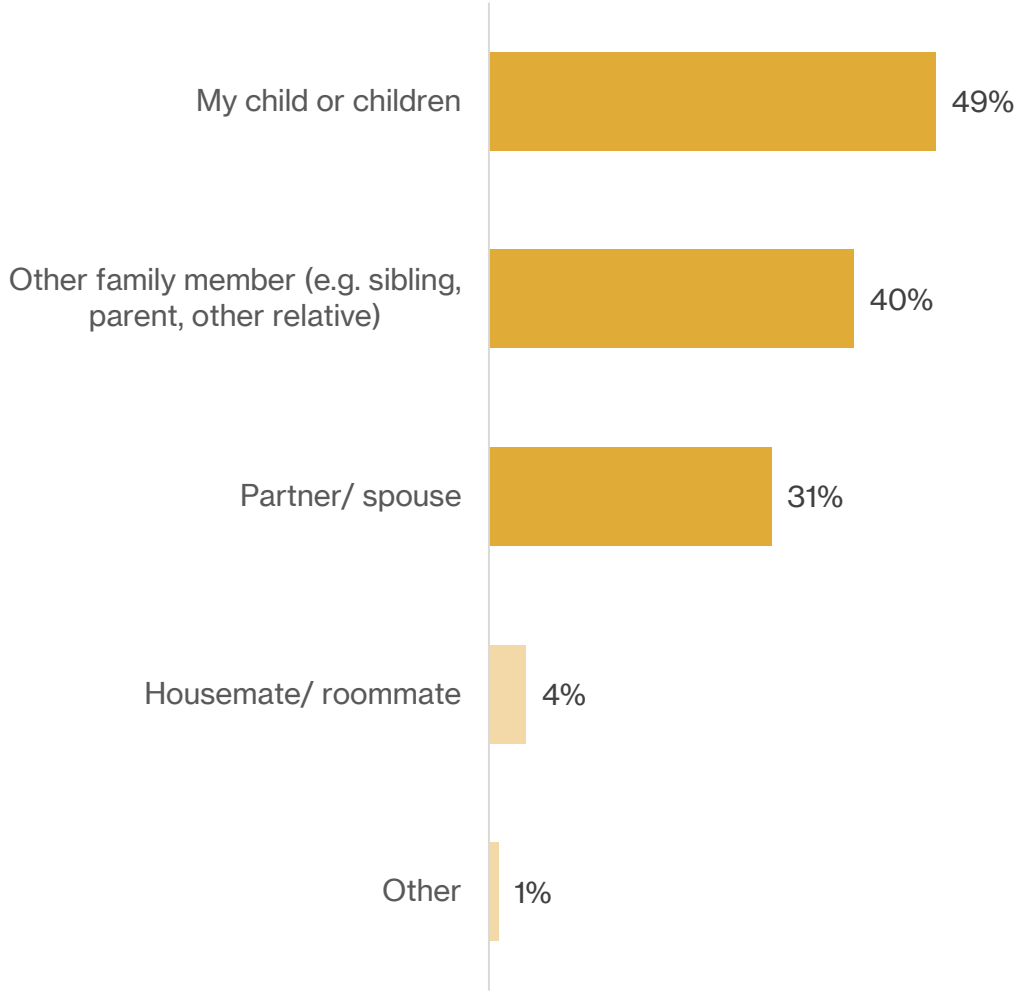
Subgroup analysis

Subgroup	Significant variations noted
Age	Respondents aged 16 to 34 years were significantly more likely to state: • Yes – definitely (47%, n=141) • Yes – maybe (35%, n=97) And less likely to state: • No (14%, n=40) • Don't know/unsure (5%, n=14) Respondents aged 35 to 54 years were significantly more likely to state: • Yes – definitely (49%, n=144) And less likely to state: • Yes – maybe (49%, n=144) Respondents aged 55+ years were significantly more likely to state: • No (51% n=216) And more likely to state: • Yes – definitely (22%, n=94)
Gender	Male respondents were significantly less likely to state: • Yes – definitely (32%, n=125) Female respondents were significantly more likely to state: • Yes – definitely (44%, n=251)
Region	No significant variations

Q. Apart from you, is there anybody else in your household or family who might be interested in using or visiting an ice-rink facility?

POTENTIAL INTEREST FROM SPECIFIED OTHERS IN THE HOUSEHOLD

Chart 5 – Potential interest from specified others in the household
(Percentage of respondents who stated others from their household might be interested in using or visiting an ice-rink facility, n=643)*



* Percentages do not sum to 100 due to multiple responses.
Q. And who would they be?

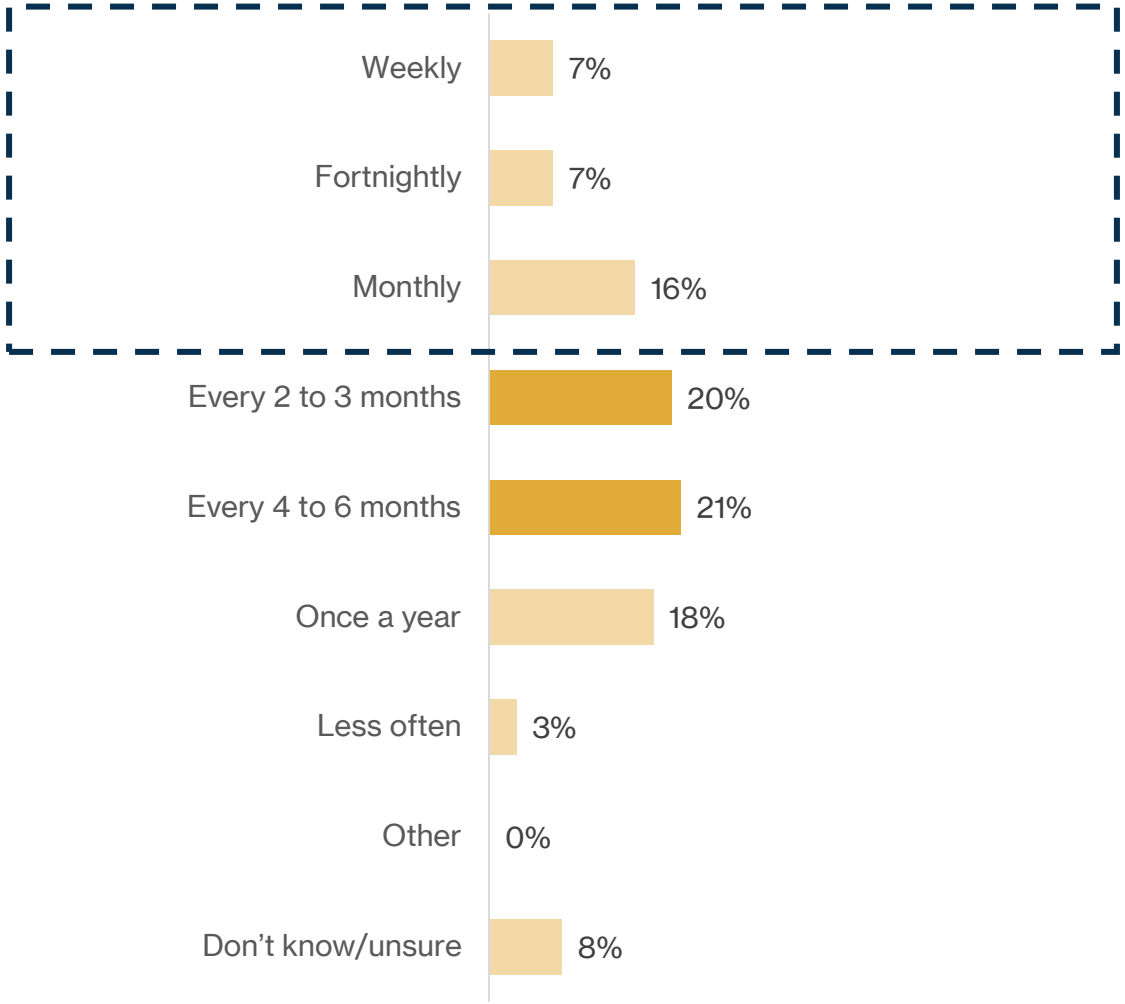
Close to one half of the respondents stated that their children would be interested in an ice-rink facility, 40% specified other family members such as a sibling or parent, while 30% stated their partner or spouse. Only 4% mentioned their housemate or roommate.

Subgroup analysis

Subgroup	Significant variations noted
Age	Respondents aged 16 to 34 years were significantly more likely to state: • Partner/ spouse (45%, n=105) • Housemate/ roommate (9%, n=25) And less likely to state: • My child or children (29%, n=71) Respondents aged 35 to 54 years were significantly more likely to state: • My child or children (77%, n=160) And less likely to state: • Other family member (22%, n=45) Respondents aged 55+ years were significantly more likely to state: • Other family member (55%, n=109) And less likely to state: • Partner/ spouse (16%, n=32)
Gender	No significant variations
Region	No significant variations

EXPECTED FREQUENCY OF VISITS OF OTHERS IN THE HOUSEHOLD

Chart 6 – Expected frequency of visits of others in the household
(Percentage of respondents who stated others from their household might be interested in an ice-rink facility, n=643)



Q. Approximately, how often do you think they would be likely to use or visit the ice-rink facility?

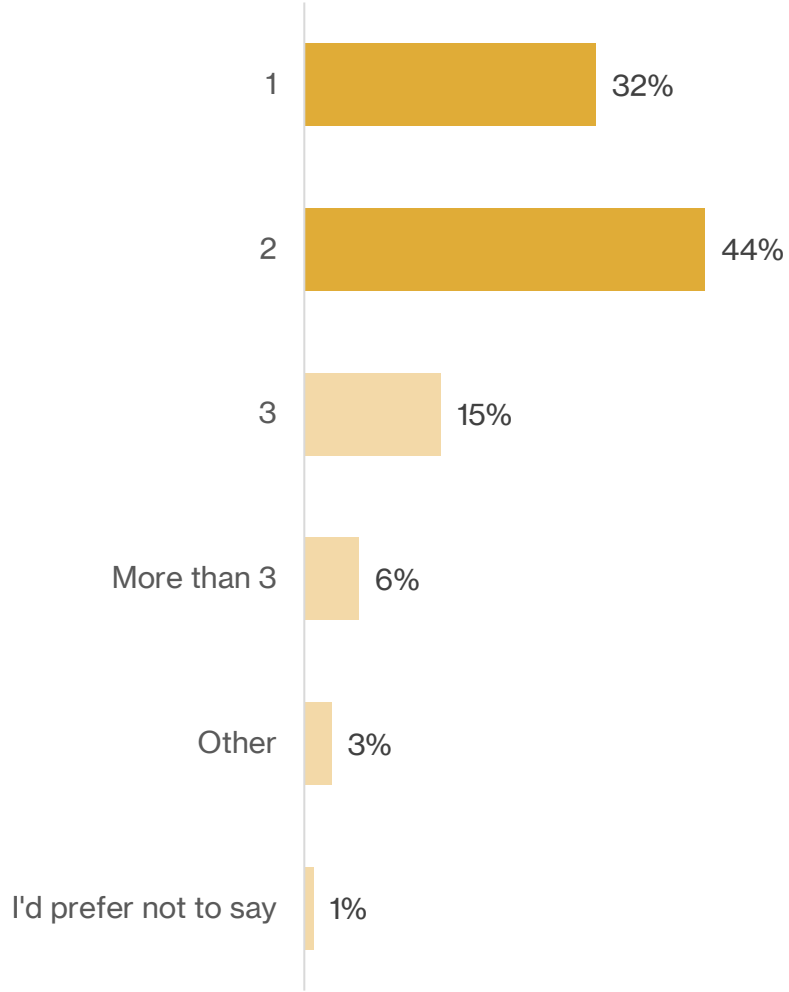
Of those who mentioned potential interest from others in the household in an ice-rink facility, 30% expected them to visit relatively frequently on a weekly to monthly basis. 42% stated every 2 to 6 months, and close to one in five stated once a year. Only 3% stated less often.

Subgroup analysis

Subgroup	Significant variations noted
Age	No significant variations
Gender	No significant variations
Region	No significant variations

NUMBER OF CHILDREN WHO WOULD USE THE RINK

Chart 7 – Number of children who would use the rink
(Percentage of respondents who stated their child or children would be interested in an ice-rink facility, n=315)*



Among the respondents who stated their children would be interested in an ice-rink facility, 75% in total expected 1 or 2 of their children to use the rink, and 21% stated 3 or more children.

Subgroup analysis

Subgroup	Significant variations noted
Age	No significant variations
Gender	No significant variations
Region	No significant variations

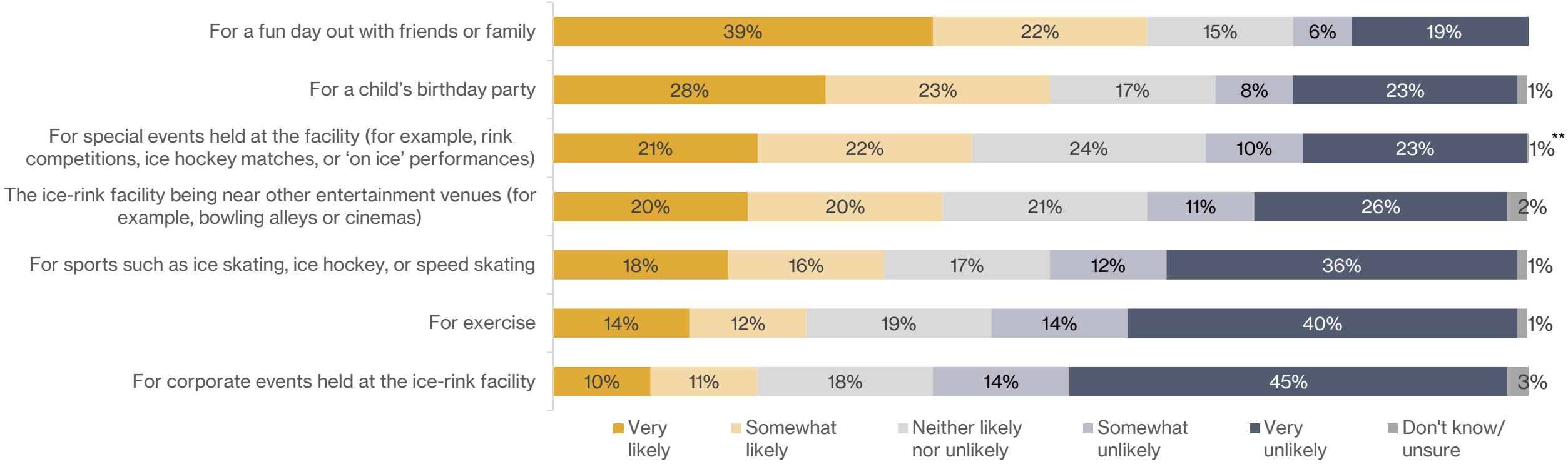
* Percentages do not sum to 100 due to rounding.
Q. Approximately, how many of your children would use the ice-rink?

SECTION FOUR

USAGE OF AND TRAVEL TO AN ICE-RINK FACILITY

USAGE OF AN ICE-RINK FACILITY (1)

Chart 8 – Usage of an ice-rink facility
(Percentage of all respondents, n=1,000)*

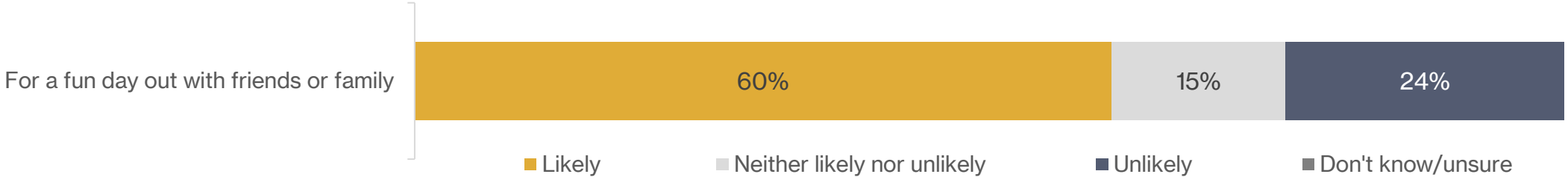


In total, 60% of the respondents were likely to use an ice-rink facility for a fun day out with friends or family, while 51% would consider it for a child's birthday party. Respondents were relatively unlikely to use the facility for exercise (only 26% likely) or corporate events (20%).

*Percentages may not sum to 100 due to rounding.
** The bar chart does not graphically show the small percentage figures in this instance.
Q. Here are some reasons other people have mentioned for using or visiting an ice-rink facility. How likely would you, or someone in your household or family, be to use it for that reason.

USAGE OF AN ICE-RINK FACILITY (2)

Chart 8a – Usage of an ice-rink facility
(Percentage of all respondents, n=1,000)*



In total, 60% reported that they would be likely to go to the ice-rink facility "for a fun day out with friends or family", while about 1 in 4 said they would be unlikely to do so.

Subgroup analysis

Subgroup	Significant variations noted
Age	Respondents aged 16 to 34 years were significantly more likely to state: • Likely (79%, n=233) Respondents aged 35 to 54 years were significantly more likely to state: • Likely (68%, n=196) And less likely to state: • Unlikely (17%, n=49) Respondents aged 55+ years were significantly more likely to state: • Unlikely (44%, n=184) And less likely to state: • Likely (40%, n=168)

Subgroup analysis

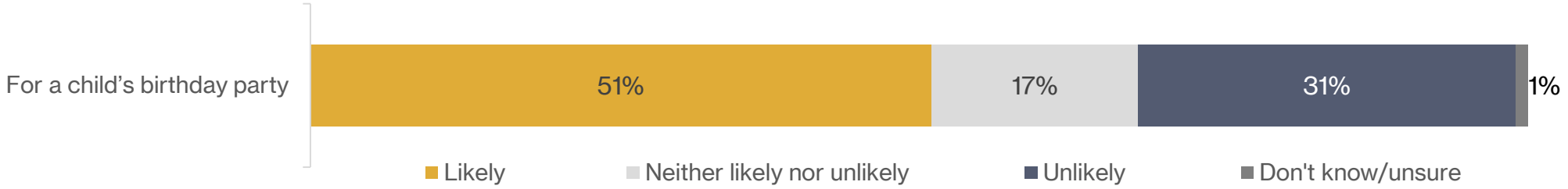
Subgroup	Significant variations noted
Gender	Male respondents were significantly more likely to state: • Unlikely (28%, n=137) And less likely to state: • Likely (54%, n=211) Female respondents were significantly more likely to state: • Likely (66%, n=378) And less likely to state: • Unlikely (20%, n=113)
Region	No significant variations

* Percentages do not sum to 100 due to rounding.

Q. Here are some reasons other people have mentioned for using or visiting an ice-rink facility. How likely would you, or someone in your household or family, be to use it for that reason.

USAGE OF AN ICE-RINK FACILITY (3)

Chart 8b – Usage of an ice-rink facility
(Percentage of all respondents, n=1,000)



In total, 51% reported that they would be likely to go to the ice-rink facility "for a child's birthday party", while 31% would be unlikely to do so.

Subgroup analysis

Subgroup	Significant variations noted
Age	Respondents aged 16 to 34 years were significantly more likely to state: • Likely (59%, n=177) And less likely to state: • Unlikely (18%, n=51) Respondents aged 35 to 54 years were significantly more likely to state: • Likely (57%, n=167) Respondents aged 55+ years were significantly more likely to state: • Unlikely (45%, n=189) and less likely to state: • Likely (39%, n=166)

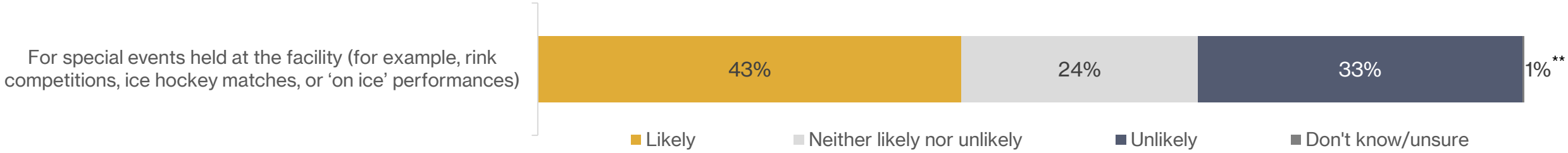
Subgroup analysis

Subgroup	Significant variations noted
Gender	Male respondents were significantly more likely to state: • Unlikely (36%, n=164) And less likely to state: • Likely (45%, n=179) Female respondents were significantly more likely to state: • Likely (57%, n=327) And less likely to state: • Unlikely (27%, n=150)
Region	No significant variations

Q. Here are some reasons other people have mentioned for using or visiting an ice-rink facility. How likely would you, or someone in your household or family, be to use it for that reason.

USAGE OF AN ICE-RINK FACILITY (4)

Chart 8c – Usage of an ice-rink facility
(Percentage of all respondents, n=1,000)*



In total, 43% reported that they would be likely to go to the ice-rink facility "for special events held at the facility (for example, rink competitions, ice hockey matches, or 'on ice' performances)", while 33% would be unlikely to do so.

Subgroup analysis

Subgroup	Significant variations noted
Age	Respondents aged 16 to 34 years were significantly more likely to state: • Likely (55%, n=164) And less likely to state: • Unlikely (18%, n=52) Respondents aged 55+ years were significantly more likely to state: • Unlikely (46%, n=192) and less likely to state: • Likely (32%, n=134)

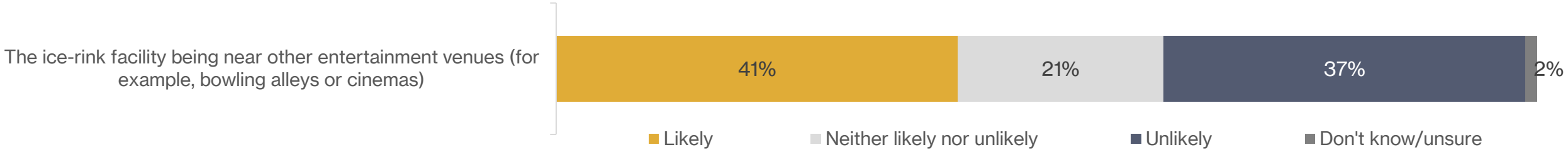
Subgroup analysis

Subgroup	Significant variations noted
Gender	No significant variations
Region	No significant variations

*Percentages do not sum to 100 due to rounding.
** The bar chart does not graphically show the small percentage figures in this instance.
Q. Here are some reasons other people have mentioned for using or visiting an ice-rink facility. How likely would you, or someone in your household or family, be to use it for that reason.

USAGE OF AN ICE-RINK FACILITY (5)

Chart 8d – Usage of an ice-rink facility
(Percentage of all respondents, n=1,000)*



In total, roughly the same proportion of respondents were likely (41%) and unlikely (37%) to go to the ice-rink facility if it were "near other entertainment venues (for example, bowling alleys or cinemas)". About one in five respondents were neutral in response to this scenario.

Subgroup analysis

Subgroup	Significant variations noted
Age	Respondents aged 16 to 34 years were significantly more likely to state: • Likely (61%, n=182) And less likely to state: • Unlikely (17%, n=48) Respondents aged 55+ years were significantly more likely to state: • Unlikely (53%, n=224) and less likely to state: • Likely (25%, n=106)

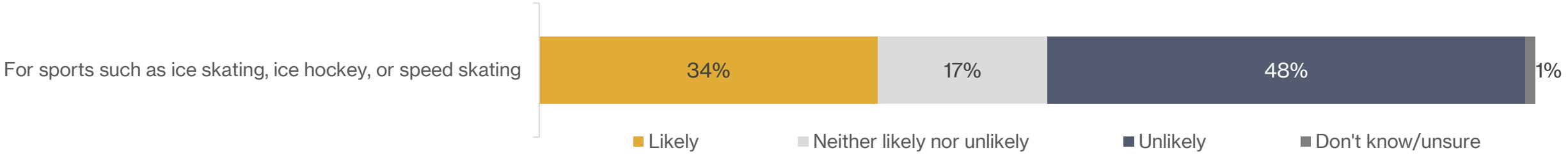
Subgroup analysis

Subgroup	Significant variations noted
Gender	No significant variations
Region	No significant variations

*Percentages do not sum to 100 due to rounding.
Q. Here are some reasons other people have mentioned for using or visiting an ice-rink facility. How likely would you, or someone in your household or family, be to use it for that reason.

USAGE OF AN ICE-RINK FACILITY (6)

Chart 8e – Usage of an ice-rink facility
(Percentage of all respondents, n=1,000)



In total, 34% reported that they would be likely to go to the ice-rink facility "for sports such as ice skating, ice hockey, or speed skating". A greater proportion of 48% stated they would be unlikely to do so.

Subgroup analysis

Subgroup	Significant variations noted
Age	Respondents aged 16 to 34 years were significantly more likely to state: • Likely (50%, n=148) • Neither likely nor unlikely (22%, n=58) And less likely to state: • Unlikely (27%, n=82) Respondents aged 55+ years were significantly more likely to state: • Unlikely (53%, n=224) and less likely to state: • Likely (25%, n=106)

Subgroup analysis

Subgroup	Significant variations noted
Gender	No significant variations
Region	Respondents in Rural and Regional were significantly more likely to state: • Neither likely nor unlikely (30%, n=23)

Q. Here are some reasons other people have mentioned for using or visiting an ice-rink facility. How likely would you, or someone in your household or family, be to use it for that reason.

USAGE OF AN ICE-RINK FACILITY (7)

Chart 8f – Usage of an ice-rink facility
(Percentage of all respondents, n=1,000)

In total, only around one in four respondents reported that they would be likely to go to the ice-rink facility "for exercise". More than one half stated they would be unlikely to do so.

Subgroup analysis

Subgroup	Significant variations noted
Age	Respondents aged 16 to 34 years were significantly more likely to state: • Likely (41%, n=116) • Neither likely nor unlikely (26%, n=71) And less likely to state: • Unlikely (33%, n=100) Respondents aged 55+ years were significantly more likely to state: • Unlikely (69%, n=289) and less likely to state: • Neither likely nor unlikely (13%, n=53) • Likely (17%, n=71)

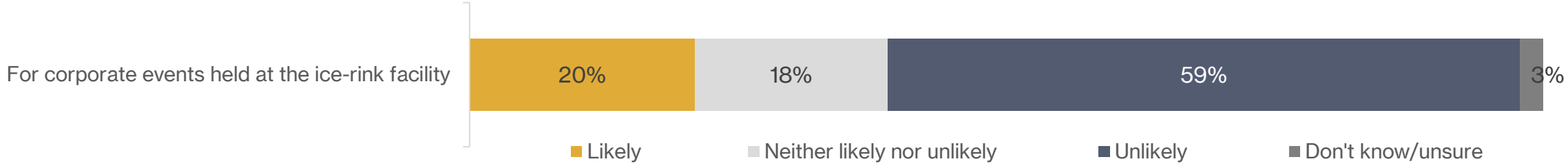
Subgroup analysis

Subgroup	Significant variations noted
Gender	No significant variations
Region	No significant variations

Q. Here are some reasons other people have mentioned for using or visiting an ice-rink facility. How likely would you, or someone in your household or family, be to use it for that reason.

USAGE OF AN ICE-RINK FACILITY (8)

Chart 8g – Usage of an ice-rink facility
(Percentage of all respondents, n=1,000)



In total, one in five respondents reported that they would be likely to go to the ice-rink facility "for corporate events held at the ice-rink facility", while 59% would be unlikely to do so.

Subgroup analysis

Subgroup	Significant variations noted
Age	Respondents aged 16 to 34 years were significantly more likely to state: • Likely (35%, n=101) • Neither likely nor unlikely (24%, n=68) And less likely to state: • Unlikely (38%, n=113) Respondents aged 35-54 years were significantly less likely to state: • Likely (15%, n=43) Respondents aged 55+ years were significantly more likely to state: • Unlikely (72%, n=302) and less likely to state: • Neither likely nor unlikely (13%, n=53) • Likely (12%, n=53)

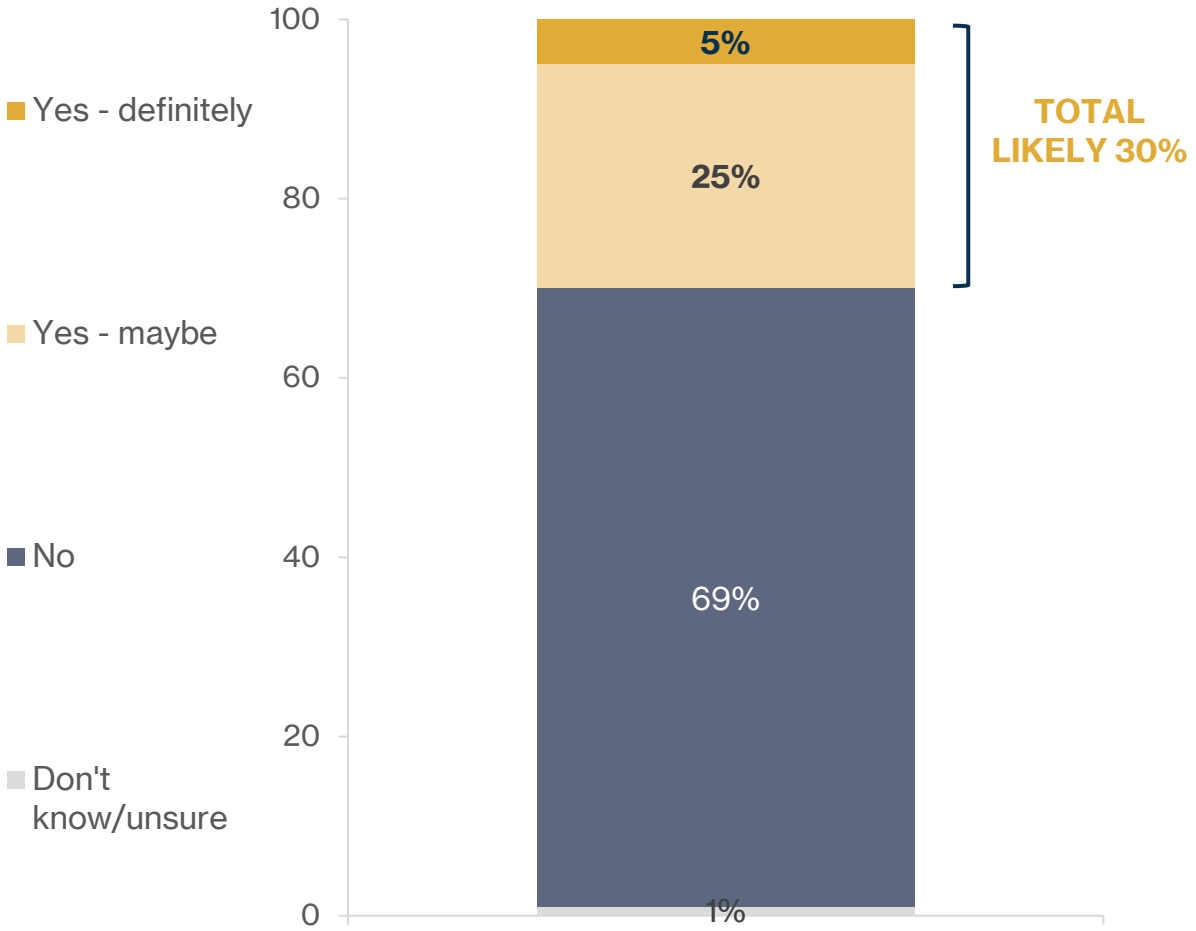
Subgroup analysis

Subgroup	Significant variations noted
Gender	No significant variations
Region	No significant variations

Q. Here are some reasons other people have mentioned for using or visiting an ice-rink facility. How likely would you, or someone in your household or family, be to use it for that reason.

CONSIDERED LIKELIHOOD OF VISITING THE FACILITY

Chart 9 – Considered likelihood of visiting the facility
(Percentage of respondents who were not initially likely to visit the new ice-rink facility, n=385)



Of those who initially said they were unlikely to visit an ice-rink, 30% stated they would be likely to do so after considering the different usages and scenarios that were described to them. Of these, 5% said yes definitely. However, a majority of 70% remained unlikely to visit or unsure.

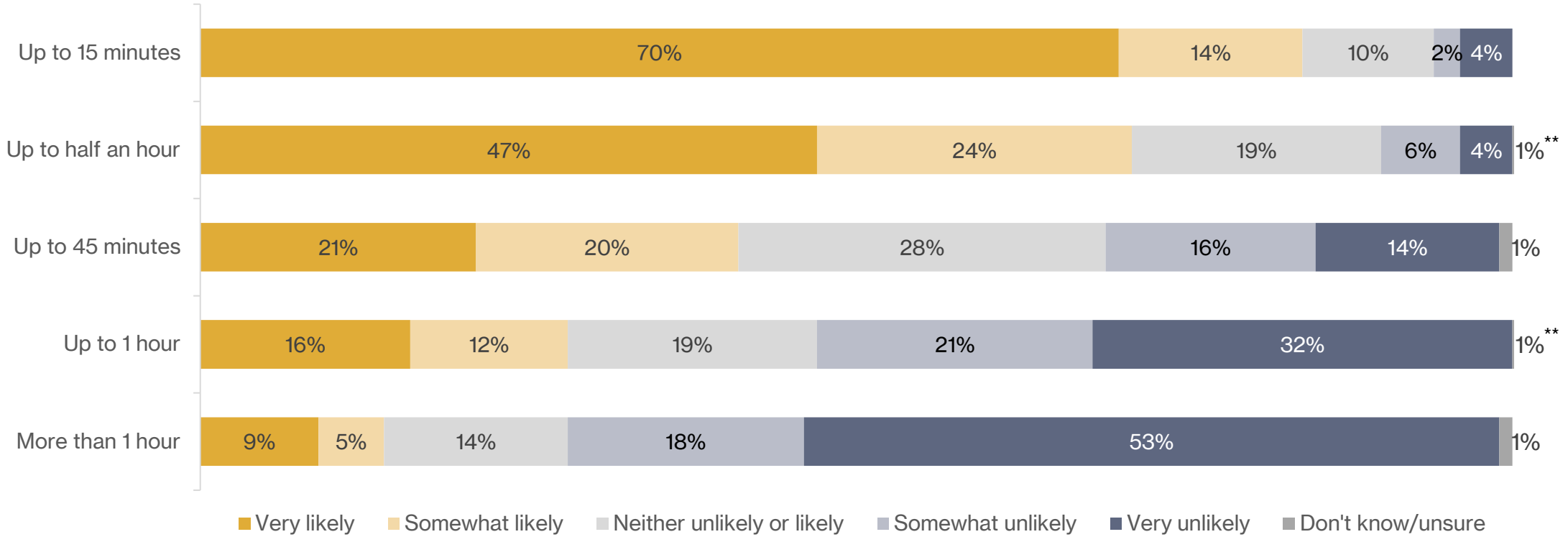
Subgroup analysis

Subgroup	Significant variations noted
Age	No significant variations
Gender	No significant variations
Region	No significant variations

Q. Having considered these reasons, would you now be likely, overall, to use or visit the ice-rink facility?

TRAVEL TIME TO THE FACILITY (1)

Chart 10 – Travel time to the facility
(Percentage of all respondents, n=1,000)*

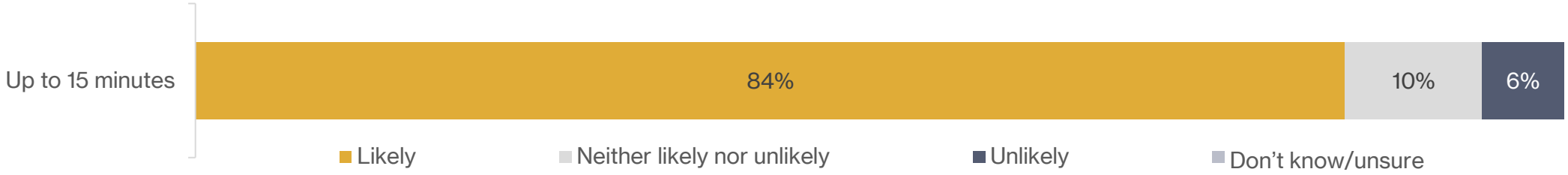


70% of respondents said they would be very likely to go to the ice-rink facility if the travel time was within 15 minutes, while close to one half (47%) said they would be very likely to accept a travel time of up to half an hour. Over one half of the respondents (53%) said they would be very unlikely to go to the ice-rink facility if the travel time was more than 1 hour.

*Percentages may not sum to 100 due to rounding.
** The bar chart does not graphically show the small percentage figures in this instance.
Q. I'm going to read you some possible travel times from your home to the ice-rink facility. How likely you would be to travel for each length of time.

TRAVEL TIME TO THE FACILITY (2)

Chart 10a – Travel time to the facility
(Percentage of all respondents, n=1,000)



In total, 84% reported that they would be likely to travel "up to 15 minutes" to an ice-rink facility, and only 6% stated they would be unlikely.

Subgroup analysis

Subgroup	Significant variations noted
Age	Respondents aged 16 to 34 years were significantly more likely to state: • Neither likely nor unlikely (14%, n=35) And less likely to state: • Unlikely (78%, n=214) Respondents aged 35-54 years were significantly less likely to state: • Likely (93%, n=217)

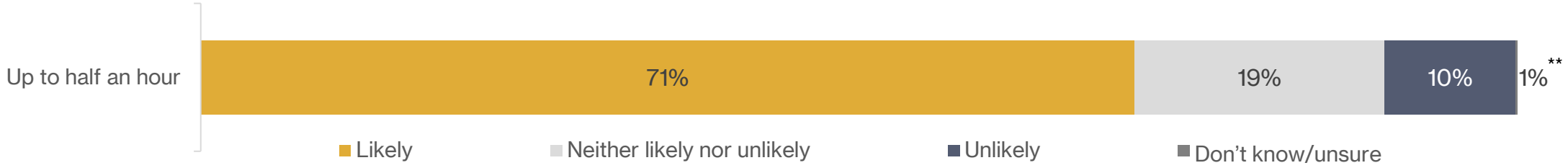
Subgroup analysis

Subgroup	Significant variations noted
Gender	Male respondents were significantly more likely to state: • Unlikely (8%, n=25) And less likely to state: • Likely (79%, n=228) Female respondents were significantly more likely to state: • Likely (87%, n=383)
Region	No significant variations

Q. I'm going to read you some possible travel times from your home to the ice-rink facility. How likely you would be to travel for each length of time.

TRAVEL TIME TO THE FACILITY (3)

Chart 10b – Travel time to the facility
(Percentage of all respondents, n=1,000)*



In total, 71% reported that they would be likely to travel "up to half an hour" to an ice-rink facility, while 10% stated they would be unlikely.

Subgroup analysis

Subgroup	Significant variations noted
Age	Respondents aged 16 to 34 years were significantly more likely to state: • Neither likely nor unlikely (14%, n=35) And less likely to state: • Unlikely (78%, n=214) Respondents aged 35-54 years were significantly less likely to state: • Likely (93%, n=217)

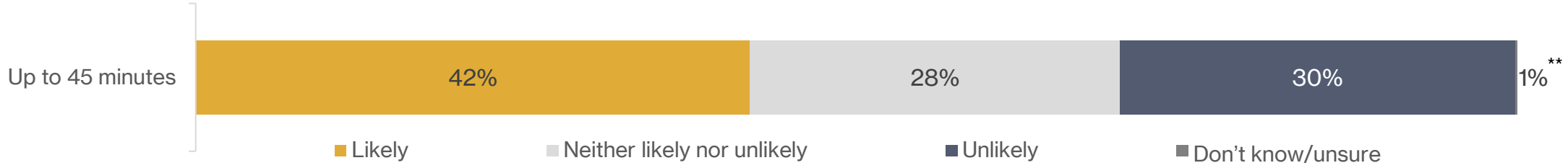
Subgroup analysis

Subgroup	Significant variations noted
Gender	Male respondents were significantly more likely to state: • Unlikely (8%, n=25) And less likely to state: • Likely (79%, n=228) Female respondents were significantly more likely to state: • Likely (87%, n=383)
Region	No significant variations

*Percentages do not sum to 100 due to rounding.
** The bar chart does not graphically show the small percentage figures in this instance.
Q. I'm going to read you some possible travel times from your home to the ice-rink facility. How likely you would be to travel for each length of time.

TRAVEL TIME TO THE FACILITY (4)

Chart 10c – Travel time to the facility
(Percentage of all respondents, n=1,000)*



In total, 42% reported that they would be likely to travel "up to 45 minutes" to an ice-rink facility, and 30% stated they would be unlikely.

Subgroup analysis

Subgroup	Significant variations noted
Age	Respondents aged 16 to 34 years were significantly less likely to state: • Unlikely (22%, n=62) Respondents aged 55+ years were significantly more likely to state: • Unlikely (40%, n=91) And less likely to state: • Likely (33%, n=76)

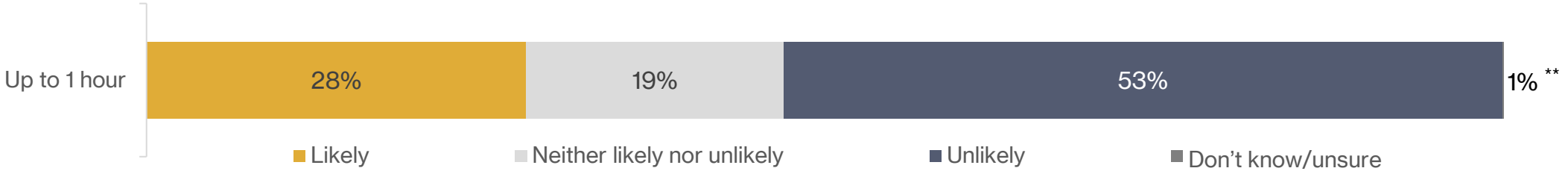
Subgroup analysis

Subgroup	Significant variations noted
Gender	No significant variations
Region	Respondents in Rural and Regional were significantly more likely to state: • Likely (66%, n=39) Respondents in Urban Regional were significantly more likely to state: • Likely (60%, n=84) And less likely to state: • Neither likely nor unlikely (16%, n=23) Respondents in Urban Fringe were significantly less likely to state: • Likely (36%, n=113)

*Percentages do not sum to 100 due to rounding.
** The bar chart does not graphically show the small percentage figures in this instance.
Q. I'm going to read you some possible travel times from your home to the ice-rink facility. How likely you would be to travel for each length of time.

TRAVEL TIME TO THE FACILITY (5)

Chart 10d – Travel time to the facility
(Percentage of all respondents, n=1,000)*



In total, only 28% reported that they would be likely to travel "up to 1 hour" to an ice-rink facility, while close to twice that proportion (53%) stated they would be unlikely.

Subgroup analysis

Subgroup	Significant variations noted
Age	Respondents aged 16 to 34 years were significantly more likely to state: • Likely (35%, n=95) Respondents aged 35 to 54 years were significantly more likely to state: • Unlikely (43%, n=119) Respondents aged 55+ years were significantly more likely to state: • Unlikely (65%, n=148) And less likely to state: • Neither likely nor unlikely (13%, n=29)

Subgroup analysis

Subgroup	Significant variations noted
Gender	No significant variations
Region	Respondents in Rural and Regional were significantly more likely to state: • Likely (43%, n=27) Respondents in Urban Regional were significantly more likely to state: • Likely (42%, n=60) And less likely to state: • Unlikely (40%, n=53) Respondents in Urban Fringe were significantly more likely to state: • Unlikely (59%, n=189) And less likely to state: • Likely (21%, n=65) Respondents in Urban Fringe were significantly less likely to state: • Likely (31%, n=66)

*Percentages do not sum to 100 due to rounding.
** The bar chart does not graphically show the small percentage figures in this instance.
Q. I'm going to read you some possible travel times from your home to the ice-rink facility. How likely you would be to travel for each length of time.

TRAVEL TIME TO THE FACILITY (6)

Chart 10e – Travel time to the facility
(Percentage of all respondents, n=1,000)

In total, only 14% reported that they would be likely to travel "more than 1 hour" to an ice-rink facility. A majority of 71% stated they would be unlikely.

Subgroup analysis

Subgroup	Significant variations noted
Age	Respondents aged 16 to 34 years were significantly more likely to state: • Likely (21%, n=57) And less likely to state: • Unlikely (60%, n=167) Respondents aged 55+ years were significantly more likely to state: • Unlikely (78%, n=179)

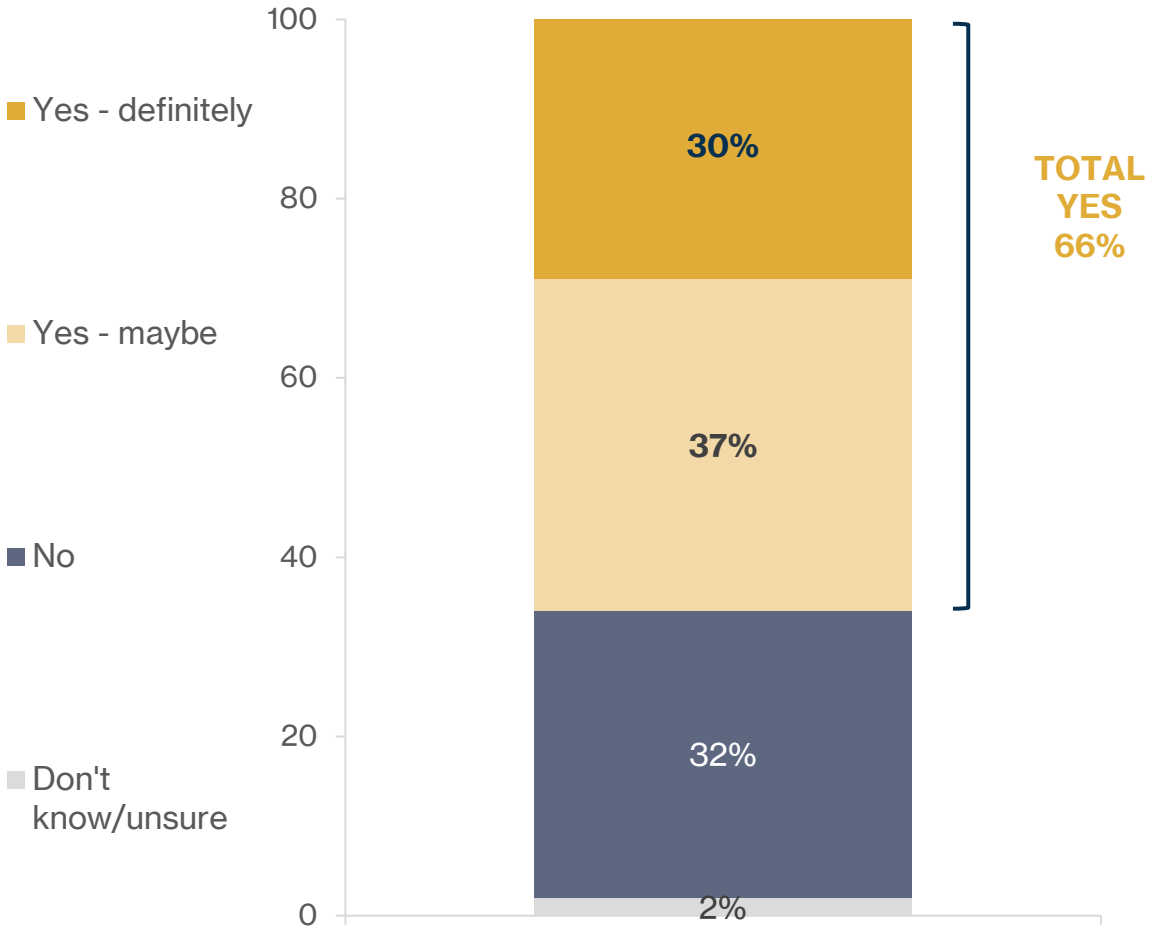
Subgroup analysis

Subgroup	Significant variations noted
Gender	No significant variations
Region	Respondents in Rural and Regional were significantly more likely to state: • Likely (43%, n=27) Respondents in Urban Regional were significantly more likely to state: • Likely (42%, n=60) And less likely to state: • Unlikely (40%, n=53) Respondents in Urban Fringe were significantly more likely to state: • Unlikely (59%, n=189) And less likely to state: • Likely (21%, n=65)

Q. I'm going to read you some possible travel times from your home to the ice-rink facility. How likely you would be to travel for each length of time.

WILLINGNESS TO VISIT THE ICE-RINK WHILE TRAVELLING FOR OTHER PURPOSES

Chart 11 – Willingness to visit the ice-rink while travelling for other purposes
(Percentage of all respondents, n=1,000)*



Around two-thirds of respondents said they would be willing to visit the ice-rink facility when they are visiting the surrounding area for other purposes, with 30% saying they would definitely do so. 32% of respondents stated they would not.

Subgroup analysis

Subgroup	Significant variations noted
Age	Respondents aged 16 to 34 years were significantly more likely to state: • Yes – definitely (43%, n=131) • Yes – maybe (45%, n=127) And less likely to state: • No (10%, n=28) Respondents aged 55+ years were significantly more likely to state: • No (52%, n=217) And less likely to state: • Yes – definitely (17% n=71) • Yes – maybe (18%, n=127)
Gender	Male respondents were significantly more likely to state: • No (36%, n=166) And less likely to state: • Yes – definitely (25%, n=97) Female respondents were significantly more likely to state: • Yes – definitely (34%, n=197) And less likely to state: • Yes – maybe (28%, n=154)
Region	No significant variations

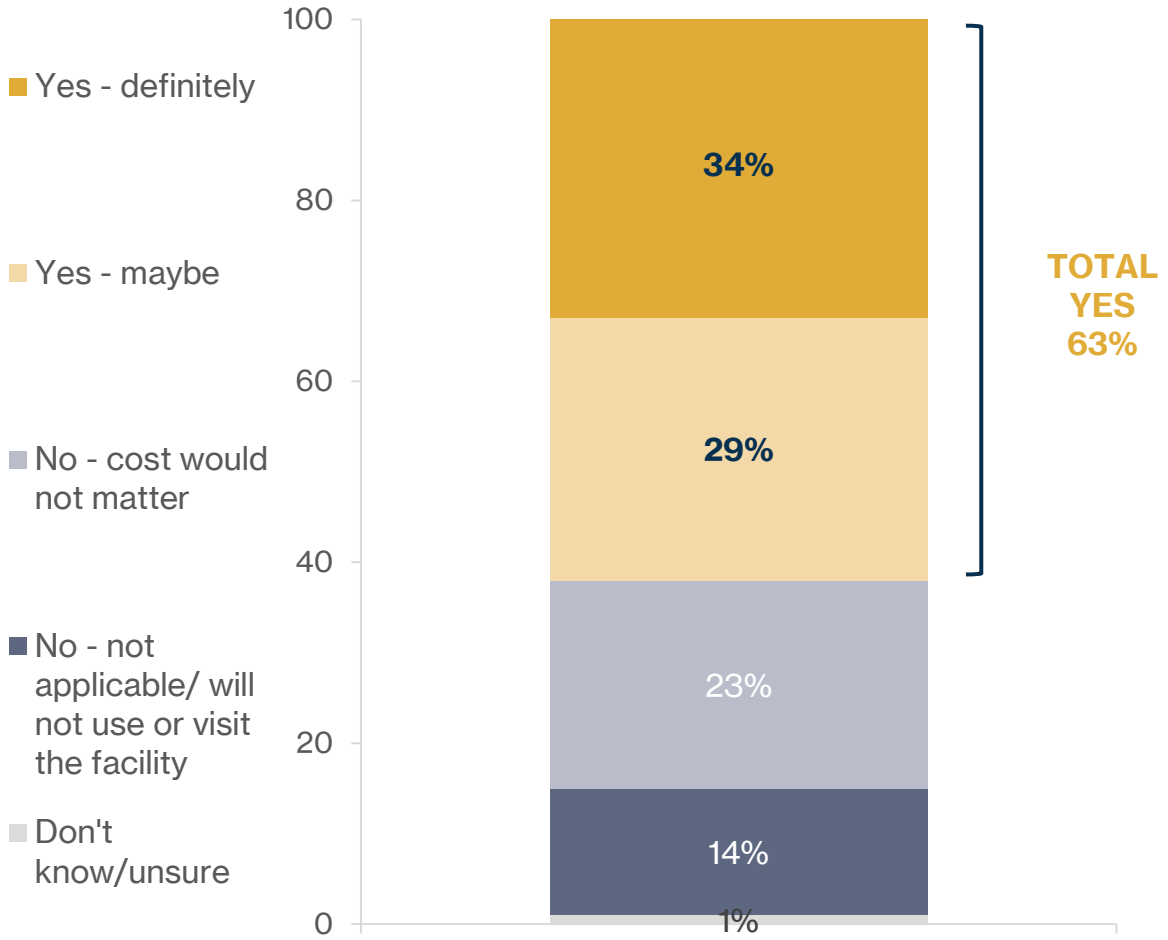
*Percentages may not sum to 100 due to rounding.

Q. If you were making a trip to the surrounding area of the ice-rink facility for another purpose (for example, a business trip, school excursion, or holiday), would you consider visiting it while you were there?

SECTION FIVE
COST OF THE ICE-RINK FACILITY

COST OF FACILITY FACTOR IN DECISION

Chart 12– Cost of facility - factor in decision
(Percentage of all respondents, n=1,000)*



A total of 63% of respondents stated that the cost of entry would be one of the factors influencing whether they visit an ice-rink facility, with the majority of this group stating yes definitely (34%). About one-quarter of respondents (23%) said it would not matter to them.

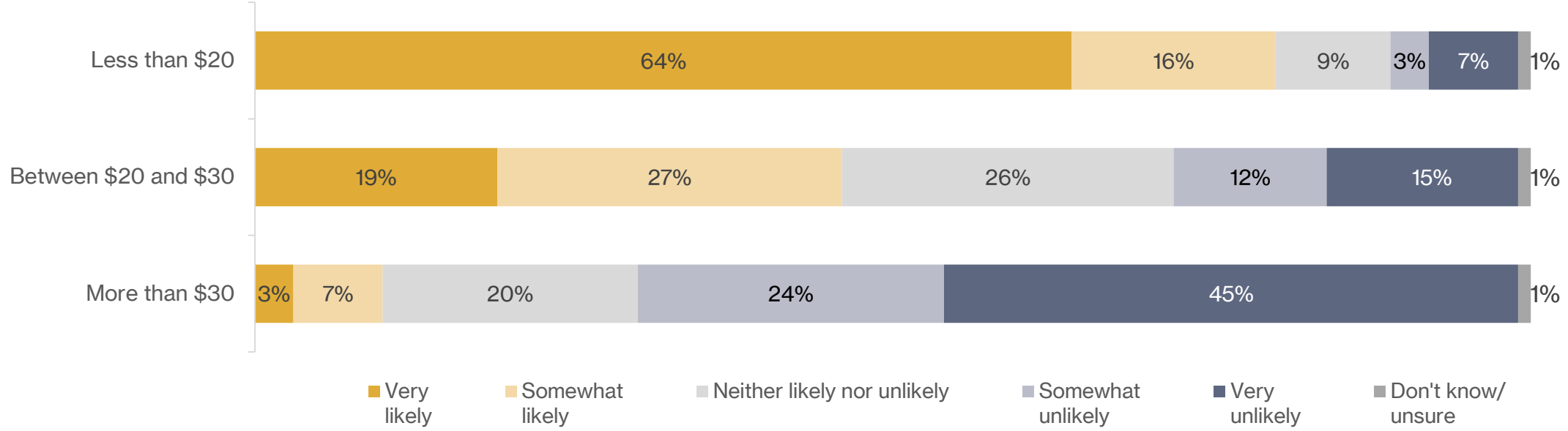
Subgroup analysis

Subgroup	Significant variations noted
Age	Respondents aged 16 to 34 years were significantly more likely to state: • Yes –maybe (42%, n=121) Respondents aged 35 to 54 years were significantly more likely to state: • Yes –definitely (41%, n=121) And less likely to state: • No - not applicable/ will not use or visit the facility (8%, n=23) Respondents aged 55+ years were significantly more likely to state: • No - not applicable/ will not use or visit the facility (27%, n=114) And less likely to state: • Yes – definitely (26% n=110) • Yes – maybe (20%, n=82)
Gender	Male respondents were significantly more likely to state: • No - cost would not matter (29%, n=122) And less likely to state: • Yes – definitely (27%, n=112) Female respondents were significantly more likely to state: • Yes – definitely (39%, n=226) And less likely to state: • No - cost would not matter (39%, n=226)
Region	No significant variations

*Percentages do not sum to 100 due to rounding.
Q. Would the cost of entry or membership be a factor in your decision to use or visit the ice-rink facility?

COST OF FACILITY PRICE POINTS

Chart 13 – Cost of facility – price points
(Percentage of all respondents, n=1,000)*



In total, 80% of respondents stated that they would be likely to use the ice-rink facility if the entry fee was less than $20, with 64% stating they would be very likely. Only 10% said they would be unlikely.

46% of respondents would be likely to visit with an entry fee between $20 and $30.

A cost of entry of more than $30 proved to be a significant deterrent, with 69% of respondents in total stating they would be unlikely to visit the ice-rink facility at this price point.

*Percentages may not sum to 100 due to rounding.
Q. I'm going to read you some possible entry costs per person per visit. For each price point, please tell me how likely you would be to use the ice-rink facility, on a scale from 1 to 5, where 1 is "very unlikely" and 5 is "very likely".

COST OF FACILITY PRICE POINTS

Subgroup analysis – less than $20 per entry

Subgroup	Significant variations noted
Age	Respondents aged 35 to 54 years were significantly more likely to state: • Very likely (73%, n=194) Less likely to state: • Somewhat likely (10%, n=27) Respondents aged 55+years were significantly more likely to state: • Very unlikely (13%, n=40) Less likely to state: • Very likely (51%, n=157)
Gender	Male respondents were significantly more likely to state: • Very unlikely (9%, n=38) Female respondents were significantly less likely to state: • Very unlikely (4%, n=22)
Region	No significant variations

Subgroup analysis – between $20-$30 per entry

Subgroup	Significant variations noted
Age	Respondents aged 16 to 34 years were significantly more likely to state: • Somewhat likely (35%, n=101) And less likely to state: • Very unlikely (7%, n=21) Respondents aged 55+ years were significantly more likely to state: • Very likely (27%, n=82) • Somewhat likely (18%, n=54) And less likely to state: • Very unlikely (13%, n=39) • Somewhat unlikely (18%, n=55)
Gender	No significant variations
Region	No significant variations

Subgroup analysis – More than $30 per entry

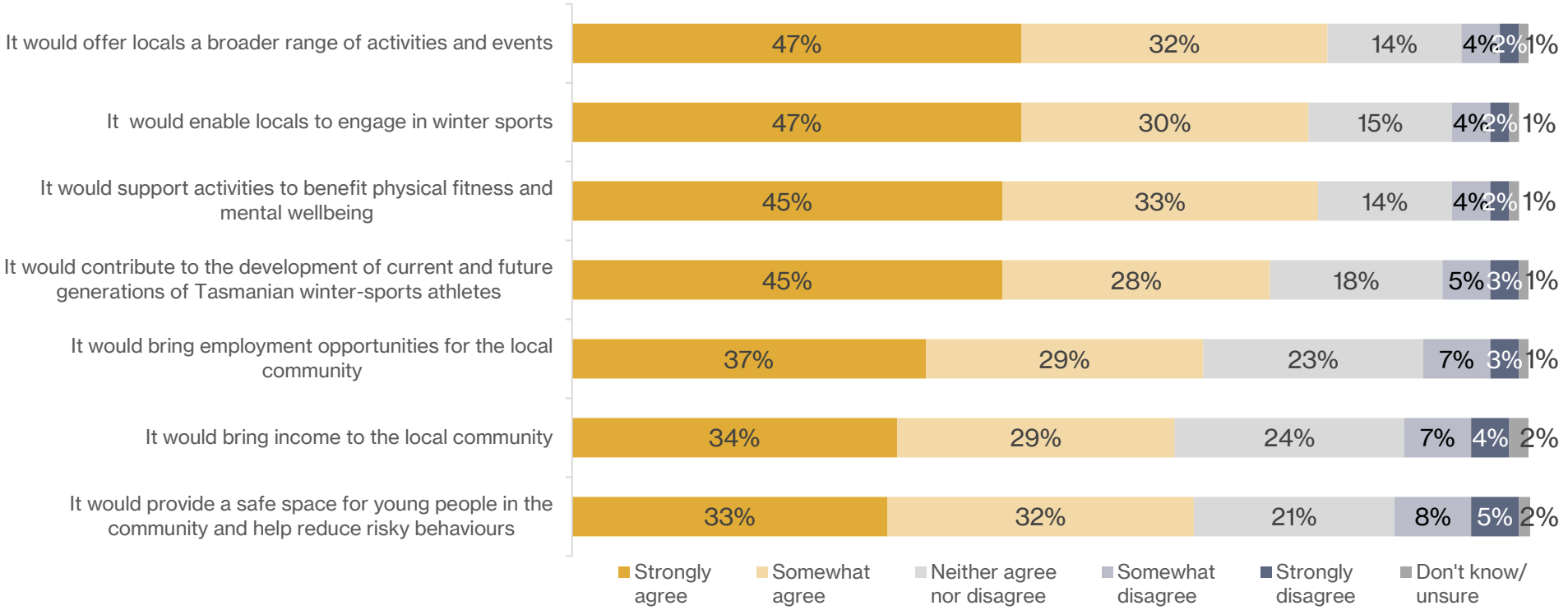
Subgroup	Significant variations noted
Age	Respondents aged 16 to 34 years were significantly more likely to state: • Very likely (11%, n=32) • Somewhat likely (29%, n=79) And less likely to state: • Very unlikely (27%, n=79) Respondents aged 55+ years were significantly more likely to state: • Very unlikely (64%, n=195) And less likely to state: • Somewhat likely (11%, n=33)
Gender	No significant variations
Region	No significant variations

Q. I'm going to read you some possible entry costs per person per visit. For each price point, please tell me how likely you would be to use the ice-rink facility, on a scale from 1 to 5, where 1 is "very unlikely" and 5 is "very likely".

SECTION SIX
COMMUNITY BENEFITS

COMMUNITY BENEFITS AND DRAWBACKS AGREEMENT AND DISAGREEMENT (1)

Chart 14 – Community benefits - agree/ disagree
(Percentage of all respondents, n=1,000)*



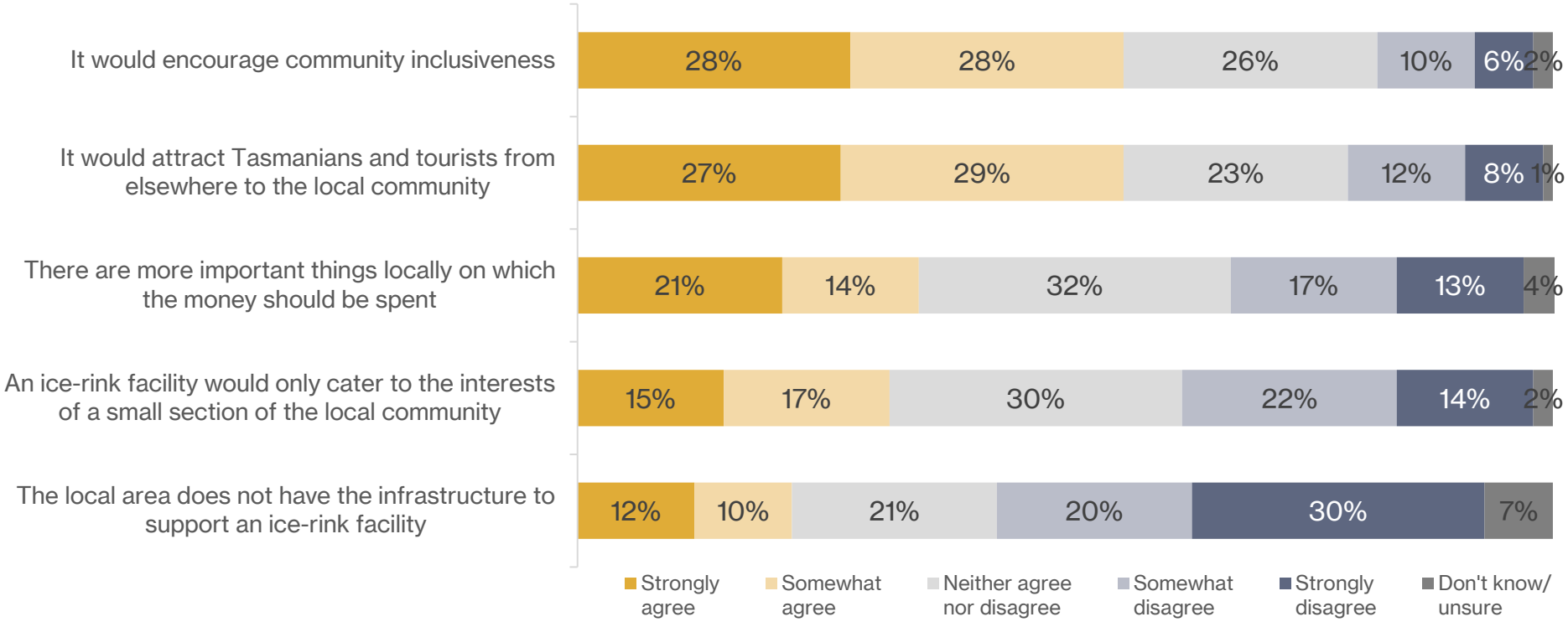
	TOTAL AGREE	TOTAL DISAGREE
It would offer locals a broader range of activities and events	79%	6%
It would enable locals to engage in winter sports	77%	6%
It would support activities to benefit physical fitness and mental wellbeing	79%	6%
It would contribute to the development of current and future generations of Tasmanian winter-sports athletes	74%	8%
It would bring employment opportunities for the local community	65%	11%
It would bring income to the local community	62%	11%
It would provide a safe space for young people in the community and help reduce risky behaviours	65%	12%

More than three in four respondents agreed in each case that an ice-rink facility would offer a broader range of activities or events to the locals, enable locals to participate in winter sports, and promote activities that support physical and mental wellbeing. A high proportion also agreed it would contribute to the development of Tasmanian winter-sports athletes. In each case, the clear majority of respondents strongly agreed with these benefits. Generating employment opportunities (65%) and income (62%) for the local community, as well as providing a safe space for young people (65%), were some of the other widely agreed benefits.

*Percentages may not sum to 100 due to rounding.
Q. Here are some statements on what an ice-rink facility in your area might bring to the local community. For each, please tell me if you agree or disagree, on a scale from 1 to 5, where 1 is "strongly disagree" and 5 is "strongly agree".

COMMUNITY BENEFITS AND DRAWBACKS AGREEMENT AND DISAGREEMENT (2)

Chart 14 (cont'd) – Community benefits - agree/ disagree
(Percentage of all respondents, n=1,000)*



TOTAL AGREE	TOTAL DISAGREE
56%	15%
56%	20%
35%	30%
32%	36%
22%	51%

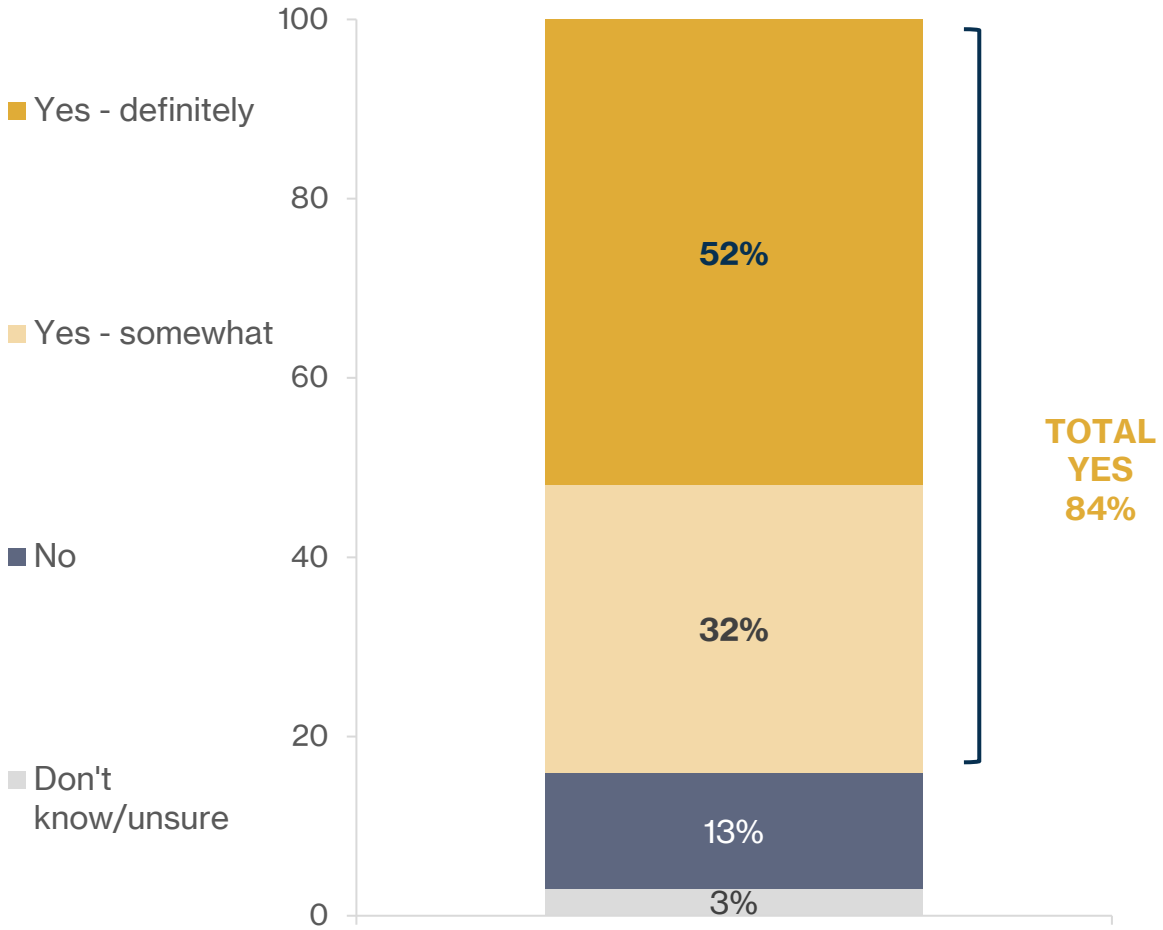
More than one half of the respondents agreed that an ice-rink facility would encourage inclusiveness in the community (56%) and boost tourism (56%).

More negatively, 35% agreed that there are more important things locally to spend the money on, 32% agreed that the facility would only cater to a small section of the local community, and 22% that their local area doesn't have the infrastructure to support an ice-rink facility. Nonetheless, the proportion of respondents who disagreed with these negative statements, or were neutral, in each case was not insignificant.

*Percentages may not sum to 100 due to rounding.
Q. Here are some statements on what an ice-rink facility in your area might bring to the local community. For each, please tell me if you agree or disagree, on a scale from 1 to 5, where 1 is "strongly disagree" and 5 is "strongly agree".

COMMUNITY BENEFITS
OVERALL BENEFICIAL TO THE AREA

Chart 15 – Community benefits – overall beneficial to area
(Percentage of all respondents, n=1,000)



Positively, 84% of respondents thought that, overall, an ice-rink facility would be beneficial to their local area and community, with over one half indicating it definitely would be. Only 13% of respondents were of the view that there would be no benefits to the community.

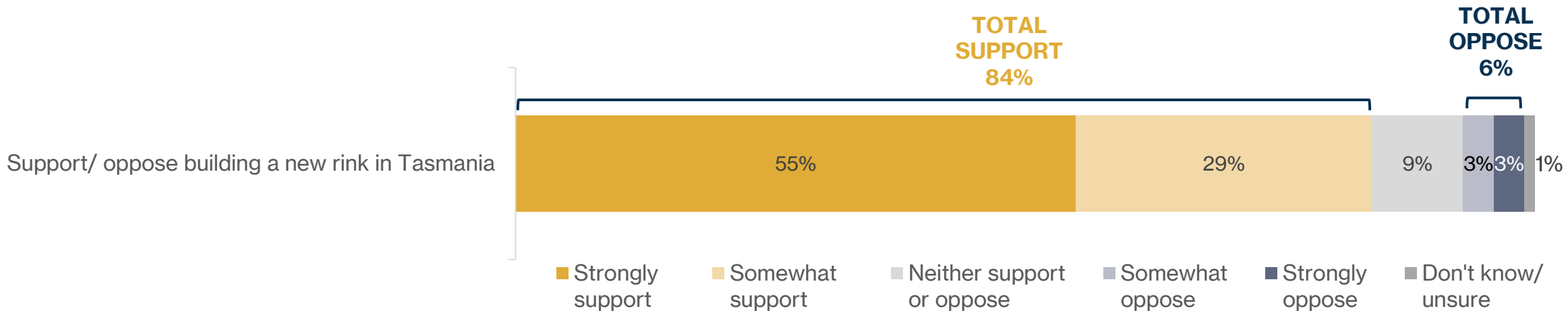
Subgroup analysis

Subgroup	Significant variations noted
Age	Respondents aged 16 to 34 years were significantly less likely to state: • No (4%, n=10) Respondents aged 55+ years were significantly more likely to state: • No (20%, n=83)
Gender	Male respondents were significantly more likely to state: • No (16%, n=75) And less likely to state: • Yes – definitely (46%, n=192) Female respondents were significantly more likely to state: • Yes – definitely (57%, n=327) And less likely to state: • No (10%, n=53)
Region	No significant variations

Q. Overall, do you think an ice-rink facility would be beneficial to your local area and community?

SUPPORT/ OPPOSE BUILDING A NEW RINK IN TASMANIA

Chart 16 – Support/ oppose building a new rink in Tasmania
(Percentage of all respondents, n=1,000)



Overall, 84% of the respondents supported the building of a new ice-rink facility, with 55% showing strong support. Only 6% of the full sample opposed this proposal, while the remaining 10% of respondents in total were neutral or unsure.

Subgroup analysis

Subgroup	Significant variations noted
Age	Respondents aged 55+ years were significantly more likely to state: • Strongly oppose (5%, n=22)

Subgroup analysis

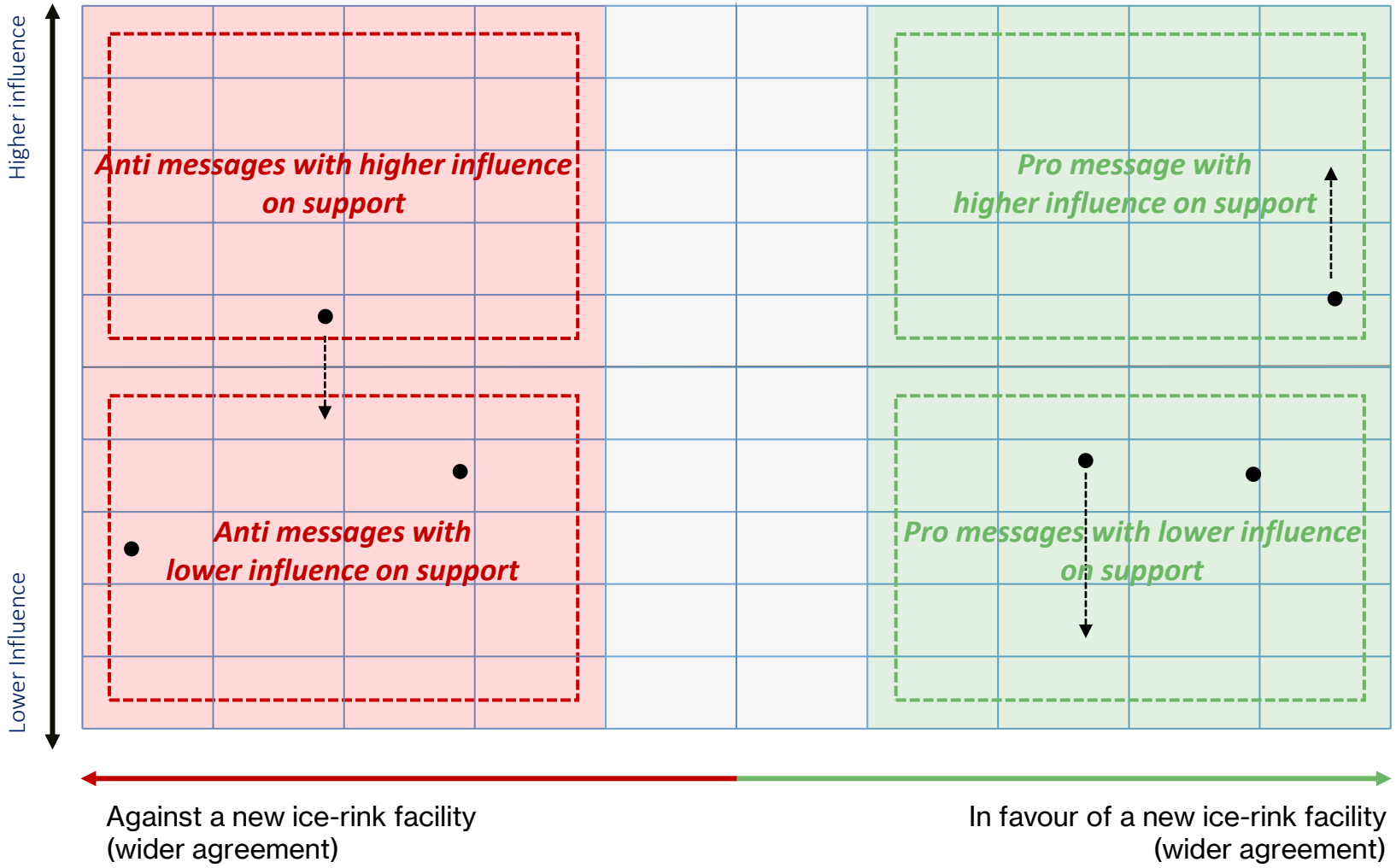
Subgroup	Significant variations noted
Gender	Male respondents were significantly less likely to state: • Strongly support (49%, n=207) Female respondents were significantly more likely to state: • Strongly support (60%, n=346)
Region	No significant variations

Q. Regardless of whether or not you will personally use the facility, do you support or oppose a new ice-rink facility being built in Tasmania?

APPENDIX 1
SUPPLEMENTARY REGRESSION ANALYSIS

QUAD EXPLAINER

Chart 17 – Quad explainer



Linear regression analysis was conducted to understand the relationship between agreement with benefits/drawbacks and considered support/opposition for the facility.

The higher an argument appears (on the y-axis), the stronger the association between agreeing with that benefit/drawback and one's support/opposition.

For benefits, the further to the right, the higher the net agreement (agreement minus disagreement) – i.e., the wider its resonance or credibility.

For drawbacks, this is the further to the left.

MESSAGE EFFECTIVENESS FOR 'SUPPORT/ OPPOSE A NEW ICE-RINK FACILITY' (1)

- Offering a broader range of activities and contributing to the development of winter sports among Tasmanians are the two most influential benefits (or 'arguments') on support for the facility from the regression analysis. These two arguments also gained a high level of agreement (79% and 73%).

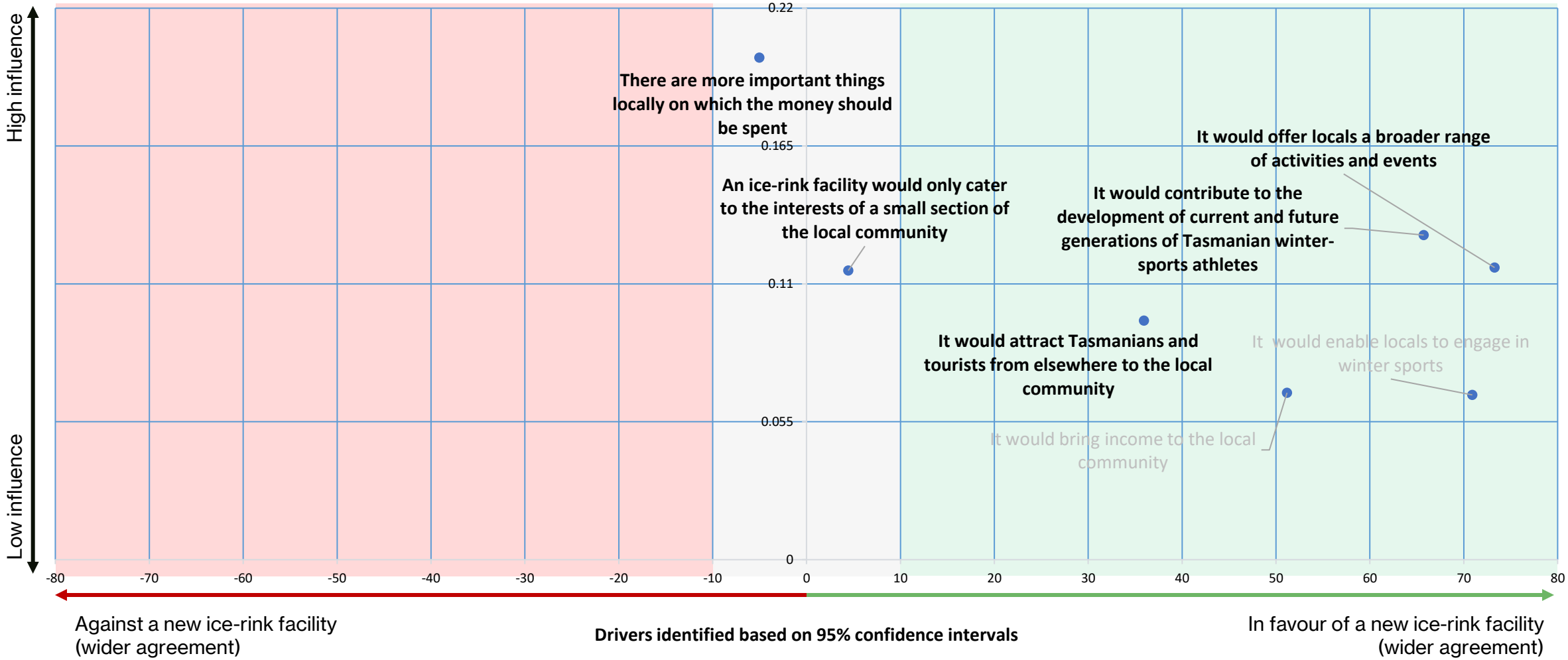
- Notably, another argument, "It would attract Tasmanians and tourists from elsewhere to the local community" is also influential among those who agree with it, although agreement is relatively low for this argument at present. This message is different from others in that it demonstrates a community benefit, rather than an individual benefit or a benefit to Tasmania as a whole. This analysis suggests that demonstrating the validity of this argument and increasing exposure to it could generate more public support.

- While the negative arguments – about there being more important things to spend money on, and the facility only catering to a small section of the local community – lack wide agreement, they do have a high level of influence among those who *do* agree with them. If exposure to these arguments were to increase, they could potentially build opposition in the community.

- This suggests proactively neutralising these messages could be important. Arguments that emphasise how the ice-rink facility can benefit the wider community – i.e., "It would attract Tasmanians and tourists from elsewhere to the local community" – and those that demonstrate the economic value of a new ice-rink facility could fill this role.

MESSAGE EFFECTIVENESS FOR 'SUPPORT/ OPPOSE A NEW ICE-RINK FACILITY' (2)

Chart 18 – Message effectiveness for 'support/ oppose a new ice-rink facility'



APPENDIX 2
SUPPLEMENTARY
SUBGROUP SEGMENTATION

SUPPLEMENTARY SUBGROUP SEGMENTATION (1)

The following tables provide supplementary subgroup segmentation providing a snapshot of the responses to key questions. Figures highlighted green denote a significantly higher proportion of respondents statistically, and those highlighted red a significantly lower proportion.

Likelihood of using or visiting an ice-rink facility

Subgroup	TOTAL YES DEFINITELY %
Gender	
Male	29%
Female	41%
Age	
16-34 years	52%
35-54 years	40%
55+ years	18%
Regional cluster	
Rural and Regional	35%
Urban Regional	39%
Urban Fringe	35%
Urban City	32%

Subgroup	TOTAL YES DEFINITELY %
Local Government Area	
Brighton	33%
Burnie	59%
Central Coast	45%
Clarence	37%
Derwent Valley	38%
Devonport	20%
Glamorgan Spring Bay	15%
Glenorchy	39%
Hobart	29%
Huon Valley	34%
Kingborough	31%
Launceston	36%
Sorell	44%
Southern Midlands	49%
West Tamar	30%

Subgroup	TOTAL YES DEFINITELY %
Children under 18 in the household	
Yes	54%
No	27%
Disability	
Yes	36%
No	35%

SUPPLEMENTARY SUBGROUP SEGMENTATION (2)

Frequency of using or visiting an ice-rink facility

Subgroup	TOTAL WEEKLY TO MONTHLY %
Gender	
Male	27%
Female	29%
Age	
16-34 years	34%
35-54 years	22%
55+ years	28%
Regional cluster	
Rural and Regional	21%
Urban Regional	24%
Urban Fringe	30%
Urban City	31%

Subgroup	TOTAL WEEKLY TO MONTHLY %
Local Government Area	
Brighton	28%
Burnie	29%
Central Coast	31%
Clarence	28%
Derwent Valley	24%
Devonport	8%
Glamorgan Spring Bay	32%
Glenorchy	38%
Hobart	28%
Huon Valley	17%
Kingborough	20%
Launceston	34%
Sorell	27%
Southern Midlands	24%
West Tamar	37%

Subgroup	TOTAL WEEKLY TO MONTHLY %
Children under 18 in the household	
Yes	28%
No	29%
Disability	
Yes	40%
No	27%

SUPPLEMENTARY SUBGROUP SEGMENTATION (3)

Travel time to the facility (i)

Subgroup	TOTAL LIKELY TO VISIT AT LENGTH OF TRAVEL %				
	Up to 15 minutes	Up to half an hour	Up to 45 minutes	Up to 1 hour	More than 1 hour
Gender					
Male	79%	69%	39%	27%	14%
Female	87%	72%	44%	27%	13%
Age					
16-34 years	78%	69%	45%	35%	21%
35-54 years	93%	78%	45%	23%	10%
55+ years	81%	63%	33%	23%	9%
Regional cluster					
Rural and Regional	81%	77%	66%	43%	16%
Urban Regional	82%	75%	60%	42%	26%
Urban Fringe	85%	71%	36%	21%	11%
Urban City	83%	66%	31%	23%	10%

SUPPLEMENTARY SUBGROUP SEGMENTATION (4)

Travel time to the facility (ii)

Subgroup	TOTAL LIKELY TO VISIT AT LENGTH OF TRAVEL %				
	Up to 15 minutes	Up to half an hour	Up to 45 minutes	Up to 1 hour	More than 1 hour
Local Government Area					
Brighton	95%	80%	45%	25%	20%
Burnie	75%	74%	67%	50%	35%
Central Coast	81%	81%	68%	61%	45%
Clarence	87%	71%	30%	16%	7%
Derwent Valley	88%	84%	74%	31%	8%
Devonport	81%	69%	50%	42%	23%
Glamorgan Spring Bay	100%	100%	76%	50%	-
Glenorchy	83%	64%	36%	21%	10%
Hobart	80%	59%	26%	18%	6%
Huon Valley	73%	69%	58%	50%	22%
Kingborough	82%	71%	36%	23%	15%
Launceston	87%	74%	36%	29%	13%
Sorell	86%	78%	70%	28%	3%
Southern Midlands	80%	80%	80%	39%	19%
West Tamar	97%	90%	60%	34%	18%

SUPPLEMENTARY SUBGROUP SEGMENTATION (5)

Travel time to the facility (iii)

Subgroup	TOTAL LIKELY TO VISIT AT LENGTH OF TRAVEL %				
	Up to 15 minutes	Up to half an hour	Up to 45 minutes	Up to 1 hour	More than 1 hour
Children under 18 in the household					
Yes	89%	79%	46%	29%	14%
No	81%	66%	39%	26%	13%
Disability					
Yes	82%	67%	45%	33%	19%
No	84%	71%	41%	27%	13%

SUPPLEMENTARY SUBGROUP SEGMENTATION (6)

Cost of facility – factor in decision to visit

Subgroup	TOTAL YES %
Gender	
Male	55%
Female	69%
Age	
16-34 years	78%
35-54 years	69%
55+ years	46%
Regional cluster	
Rural and Regional	56%
Urban Regional	59%
Urban Fringe	61%
Urban City	69%

Subgroup	TOTAL YES %
Local Government Area	
Brighton	58%
Burnie	58%
Central Coast	48%
Clarence	58%
Derwent Valley	55%
Devonport	60%
Glamorgan Spring Bay	62%
Glenorchy	65%
Hobart	64%
Huon Valley	55%
Kingborough	64%
Launceston	75%
Sorell	77%
Southern Midlands	61%
West Tamar	52%

Subgroup	TOTAL YES %
Children under 18 in the household	
Yes	79%
No	56%
Disability	
Yes	64%
No	62%

SUPPLEMENTARY SUBGROUP SEGMENTATION (7)

Cost of facility – price points (i)

Subgroup	TOTAL LIKELY TO VISIT AT PRICE POINT %		
	Less than $20	Between $20 and $30	More than $30
Gender			
Male	77%	45%	10%
Female	83%	46%	10%
Age			
16-34 years	86%	57%	14%
35-54 years	84%	48%	11%
55+ years	70%	30%	6%
Regional cluster			
Rural and Regional	78%	45%	12%
Urban Regional	84%	45%	12%
Urban Fringe	81%	48%	11%
Urban City	77%	42%	7%

SUPPLEMENTARY SUBGROUP SEGMENTATION (8)

Cost of facility – price points (ii)

Subgroup	TOTAL LIKELY TO VISIT AT PRICE POINT %		
	Less than $20	Between $20 and $30	More than $30
Local Government Area			
Brighton	73%	47%	12%
Burnie	85%	52%	18%
Central Coast	87%	52%	14%
Clarence	89%	51%	6%
Derwent Valley	76%	60%	19%
Devonport	79%	34%	11%
Glamorgan Spring Bay	100%	61%	44%
Glenorchy	74%	51%	17%
Hobart	75%	37%	5%
Huon Valley	74%	36%	4%
Kingborough	79%	40%	7%
Launceston	80%	49%	10%
Sorell	96%	45%	-
Southern Midlands	100%	20%	-
West Tamar	82%	51%	23%

SUPPLEMENTARY SUBGROUP SEGMENTATION (9)

Cost of facility – price points(iii)

Subgroup	TOTAL LIKELY TO VISIT AT PRICE POINT %		
	Less than $20	Between $20 and $30	More than $30
Children under 18 in the household			
Yes	87%	55%	12%
No	77%	41%	9%
Disability			
Yes	70%	42%	10%
No	82%	46%	10%

SUPPLEMENTARY SUBGROUP SEGMENTATION (10)

Overall agreement that an ice-rink facility would be beneficial to the local area

Subgroup	TOTAL AGREE %
Gender	
Male	81%
Female	88%
Age	
16-34 years	94%
35-54 years	84%
55+ years	76%
Regional cluster	
Rural and Regional	81%
Urban Regional	83%
Urban Fringe	84%
Urban City	86%

Subgroup	TOTAL AGREE %
Local Government Area	
Brighton	86%
Burnie	89%
Central Coast	82%
Clarence	88%
Derwent Valley	86%
Devonport	78%
Glamorgan Spring Bay	45%
Glenorchy	90%
Hobart	86%
Huon Valley	82%
Kingborough	79%
Launceston	85%
Sorell	79%
Southern Midlands	75%
West Tamar	70%

Subgroup	TOTAL DEFINITELY AGREE %
Children under 18 in the household	
Yes	61%
No	48%
Disability	
Yes	63%
No	50%

SUPPLEMENTARY SUBGROUP SEGMENTATION (11)

Overall support for building an ice-rink facility

Subgroup	TOTAL STRONGLY SUPPORT %
Gender	
Male	49%
Female	60%
Age	
16-34 years	57%
35-54 years	54%
55+ years	54%
Regional cluster	
Rural and Regional	63%
Urban Regional	53%
Urban Fringe	58%
Urban City	49%

Subgroup	TOTAL STRONGLY SUPPORT %
Local Government Area	
Brighton	42%
Burnie	72%
Central Coast	44%
Clarence	65%
Derwent Valley	74%
Devonport	44%
Glamorgan Spring Bay	67%
Glenorchy	63%
Hobart	47%
Huon Valley	59%
Kingborough	51%
Launceston	52%
Sorell	62%
Southern Midlands	39%
West Tamar	44%

Subgroup	TOTAL STRONGLY SUPPORT %
Children under 18 in the household	
Yes	60%
No	53%
Disability	
Yes	63%
No	54%

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