Sports Facilities Strategy 2015-2019 and Management Options Assessment

A Joint Report with

FMG CONSULTING

Final January 2016

Dudley Metropolitan Borough Council

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Introduction

1.1 As part of an ongoing commitment to develop sustainable participation in sport and physical activity, Dudley Metropolitan Borough Council (DMBC), in partnership with Sport England, sought to employ a Sport England approved consultant to undertake an Assessing Needs and Opportunities Guidance (ANOG) compliant audit and assessment of sports facilities in the Borough and the preparation of a Sports Facilities Strategy for the period 2015-2019. The Sports Facilities Strategy should meet all relevant requirements including those identified in the National Planning Policy Framework (NPPF).

1.2 In addition DMBC are reviewing options for the future management of the Leisure Service, in particular its major public leisure facilities, part of the commission was therefore to also employ suitable consultants to undertake a management options assessment to assist in guiding DMBC on future service delivery.

1.3 In September 2014 DMBC appointed the joint team of naa and FMG to undertake the work set out and support the development of a sports facilities strategy and management options assessment for the borough.

1.4 The scope of the facility strategy was established by the Council as:

- Swimming Pools
- Sports Halls
- Other Specialist Indoor Facilities including indoor tennis, indoor bowls and gymnastics
- Other Major Outdoor Facilities including athletics tracks and velodromes.

In terms of management options considerations it was agreed that this should focus on the key Council provision namely; Dudley Leisure Centre, Halesowen Leisure Centre, Crystals Leisure Centre and the Dell Stadium.

1.5 The outputs for the study set out in the brief were as follows:

- Sports facilities supply and demand data assessment using Sport England's Facilities Planning Model sufficient to satisfy DMBC's current and future planning and investment priorities
- Overall Sports Facilities Needs and Opportunities Assessment
- Sports Facilities Strategy and Action Plan 2015 – 2019
- Management options appraisal, report and key recommendations.

This report sets out the background data for the first two bullet points and provides an initial overview of the management options and financial considerations. This is presented to provide a basis for further detailed work, which considers detailed financial and management options to deliver the future facility strategy.

Methodology

1.6 As set out, the Sports Facility Strategy element of the brief has adopted the Sport England Assessing Needs and Opportunities Guide (ANOG) methodology, which advocates a broad approach to be undertaken looking at supply and demand and considering need in terms of:

- **Quantity** - what facilities there are in the area, how many you have?
- **Quality** – how good are they in terms of condition and being *'fit for purpose'*?
- **Accessibility** - where they are located?
- **Availability** - how available are they?

1.7 ANOG state that it is only by understanding all these elements together and their inter-relationship that you can form a rounded view of the supply and demand for facilities in an area. As also advocated by ANOG extensive consultation has been undertaken to inform the analysis. This included discussions with key internal officers at the Council, members workshop, partner and National Governing Body (NGB) consultation in line with the agreed scope.

1.8 The report sets out the supply and demand assessment for the facility types included in the study scope across the Dudley area 2014 and 2015.

1.9 The sequence of reporting set out in sections 3-5 is to:

- Describe the sources of that provide the hard evidence data for the evidence base for both sports participation and the sports facility assessments

- Describe the findings and development of the evidence base for each of the sports facilities in scope. This reporting is based on the Sport England Assessing Needs and Opportunities (ANOG) guidance and the four headings:

  - **Quantity** – which includes the quantitative findings for the supply and demand for each facility type and also sets out the sports participation profile of participation as part of the demand assessment

  - **Quality** – which includes a qualitative assessment of the age and any modernisation of any facility alongside with any local data on the quality of buildings and any findings from national governing bodies sources

  - **Accessibility** – this is an assessment of how accessible sports facilities are based on the location of the facility, travel patterns and the amount of demand which can access a venue based on the catchment area of a facility and where the demand is located. For swimming pools and sports halls there is also an accessibility assessment based on how much demand is exported from Dudley and met in neighbouring authorities

  - **Availability** – this is an assessment of how much of the sports facility capacity is used and is there unused capacity or are sports facilities full. It is also an assessment of how the demand is distributed across venues and if there is scope to re-distribute demand across venues.

- Present findings and comments from the consultations with NGBs and others on the supply and demand and key issues for each relevant facility type

- Provide an overall summary of the finding from the assessment for each sports facility type and the key issues to be considered in the final strategy development.

The analysis includes relevant sources of data and hard evidence to provide a robust evidence base. The background to these is set out below.

Sport England Active People Survey

1.1 Sport England's Active People Survey provides the most comprehensive assessment of levels of sports participation across the country at a local authority, county, sports partnership, regional and national level. It measures a range of performance indicators including participation levels, volunteering and satisfaction with local sports provision. It also measures participation in particular sports and activities and allows for an analysis of participation according to gender, disability, ethnicity and other demographic indicators

1.2 For Dudley the findings for presenting adult participation in sport and physical activity are based on using the benchmark measure of once a-week participation. In the past few years the benchmark measure adopted for measuring adult sports and physical activity participation has changed to once a week participation of 1 x 30 minutes of moderate intensity activity. This is applied by Sport England in sports policy and its assessment of funding awards. Any sport included in the '1 x 30' sport indicator has to be undertaken for at least 30 minutes and at least moderate intensity.

1.3 The '1x30' sport indicator does not include recreational walking or recreational cycling (as the former NI8 indicator did). It does include more organised and intense/strenuous walking activities: Backpacking, Hill trekking, Cliff Walking, Gorge Walking, Hill Walking, Rambling, Power Walking and sport 'walking'. The '1x30' sport indicator also includes light intensity activities for those aged 65 and over: (in recognition that for people of this age, they can be considered moderate intensity) yoga, pilates, indoor and outdoor bowls and croquet).

1.4 For a lot of the facility types included in the Dudley study the data on participation at the Dudley level is not available because the sample size of respondents in the AP survey does not develop a sufficient number of respondents to develop a participation rate, for example in indoor tennis. Where this is the case then a higher geographical level of either Black Country, West Midlands Region or even England wide is applied. Where it is reasonable to do then this rate of participation is applied to Dudley

Sport England Market Segmentation

1.5 As part of the Active People survey findings Sport England analysed the data on the English population to produce 19 market segments with distinct sporting behaviours and attitudes.

1.6 This includes information on specific sports people take part in as well as why people do sport, whether they want to do sport and the barriers to doing more sport. In addition, the segments provide information on media consumption and communication channels, social capital, health indicators including obesity and engagement in the wider cultural sphere.

1.7 The power of these sporting segments lies not only in their ability to help us better understand the characteristics of our potential market but also to explore the market base at differing geographic levels. It is possible to analyse the market in a particular local authority. Each segment has been assigned a name which reflects the most popular first names for the group.

1.8 Market segmentation allows us to develop a more sophisticated, tailored approach to delivering services. In tailoring the service we provide to the customer's individual needs, rather than adopting a 'one size fits all' approach. It is one of the best tools we have to improve public services and outcomes.

1.9 The market segmentation data for Dudley for each sports facility type has been applied to develop:

- A spatial profile of participation – which market segments are most dominant spatially
- A quantitative assessment of the number of participants for each facility across each segment
- A quantitative profile of participation across the segments by age and gender
- A quantitate assessment of who does play each sort and also those who would like to play, The latter providing an assessment of the latent demand for each sports facility or activity
- A descriptive profile of each segment which describes their motivations, barriers to participation as well as the sports they participate in most.

Black Country Cradle to Grave Evidence Base

1.10 The extremely comprehensive Black Country 'Cradle to Grave' evidence base reports for both adults and young people has been used extensively to check and challenge the findings for participation in the facility types in the development of this evidence base report. The Black Country study uses the same sources for participation, notably the Sport England Active People and market segmentation data, as well as public health data.

1.11 Its use of the evidence base compiled is in creating a baseline of where we are now in participation, then objective setting in how the evidence base can be applied, suggested interventions/actions and who by and how changes can be measured. It is focused on health and wellbeing outcomes and increasing levels of sports participation across the Black Country authorities to national levels of participation. The evidence bases provide data that is consistent for each Black Country authority and therefore provides read across on what is happening in the other authorities.

1.12 The Black Country evidence base does not have a sports facility perspective and so the evidence base in this report whilst using the same sources of participation data has applied the data in a different way. It has been used along with the separate data on the supply, demand, access ad availability of sports facilities to set a baseline of what supply and demand looks like now for each facility type and what the projected future demand could be.

1.13 So in short the review of the Black Country evidence base report on participation uses the same sources of data. There is no disagreement between the findings, the differences are in the application of the findings.

Planning tools and techniques applied to assess supply and demand for each sports facility type

1.14 The planning tools and techniques to develop the evidence base of existing facility provision do vary by facility type. There is not one type of needs assessment and methodology which is applied for all the different facility types. This is because of the comparative importance of different types of facilities and more research has been applied to the facility types which provide for the majority of the community indoor sports participation and physical activity.

1.15 Sport England has developed an extensive database and a facility supply and demand planning model (fpm) to assess provision for swimming pools and sports halls. The needs assessment for swimming pools and sports halls are developed in much greater detail than for the other facility types. The reasons being they are the bedrock of indoor community sports and physical activity provision and account for between 60% - 70% of all indoor sports and active recreation participation at community level. Sports halls provide for up to 15 individual and team sports as well as being a venue for exercise and fitness classes.

1.16 Swimming pools are the only facility type which is genuinely cradle to grave in terms of age participation. They are also the facility type where female participation is higher than male participation. Finally they are the facility type which has the highest provision and swimming pools have the highest operating costs. So the need to assess in detail the current and future provision for this facility type is most important.

1.17 Sport England has also developed Active Places Power (APP) which is a database for most of the other facility types included in the Dudley project remit. APP provides an extensive database of supply data and some tools for assessing demand. It also provides some mapping capability. APP has been used to determine the provision for most other facility types.

1.18 Furthermore the sports participation data sources of Active People and the Active People market segmentation data do vary in the measurement period they use. The benchmark measure for Active People and accepted as the benchmark measure by Sport England for both funding and policy purposes is at least once a week participation of at least 30 minutes moderate intensity duration.

1.19 Whereas the Active People market segmentation data measures the percentage of each segment that participates or would like to participate once a month. Both measures are applied in the demand assessment but in determining the overall demand participation it is the Active People once a week measure which is applied for the facility type. For swimming pools and sports halls it is the demand data generated by the Sport England facility planning model.

Table 1.1: Planning tools applied in the assessment for each sports facility type

Method of assessment	Swimming Pools	Sports Halls	School Based Sports Facilities	Health and Fitness (gyms)	Indoor Bowling	Indoor Tennis Centres	Dance Studios	Gymnastics	Outdoor athletic tracks
Sport England Active Places Power				✓	✓	✓	✓		✓
Sport England data and analysis based on the facility	✓	✓	✓		✓				

Method of assessment	Swimming Pools	Sports Halls	School Based Sports Facilities	Health and Fitness (gyms)	Indoor Bowling	Indoor Tennis Centres	Dance Studios	Gymnastics	Outdoor athletic tracks
planning model									
Sport England Assessing Needs and Opportunities Guide ANOG)	✓	✓	✓	✓	✓	✓	✓	✓	✓
Fitness Industry Association				✓					

Project Outputs

1.1 The tasks set out in the methodology was separated into two phase of work; phase one, provided a position statement of the state of play with facility provision across the authority, using the key steps identified in the methodology above.

1.2 Similarly the initial phase provided an initial overview of financial and management options (set out in section six) as the basis for further detailed work

1.3 This initial work in-turn informed phase two; which supported by Facilities Planning Model (fpm) scenario testing, developed the future facility strategy for Dudley, established priority projects in the form of an action plan and delivery mechanisms. This is set out in section 7.

Report Structure

1.4 The methodology was discussed and agreed at the kick-off meeting. The remaining sections in this report set out the context for sport in Dudley, the assessment of the facility types set out in the project scope and the assessment of finance and management issues in line with the Transformation Agenda of the Council. Consultation findings are set out throughout the report and highlighted in section 7. The final section 7 sets out the future strategy and delivery:

- Section 2 – Strategic Context
- Section 3 – Swimming Pools
- Section 4 – Sports Halls
- Section 5 – Other Facilities
- Section 6 – Finance and Management Options
- Section 7 – Key Issues and Way Forward

The document is supported by various appendices, which are referenced throughout this document.

1.20 Set out next is the key strategic drivers for sports facility development and management across Dudley.

Introduction

2.1 In producing the needs and evidence and subsequent strategy, consideration has been given to the strategic context and key national, regional and local policy drivers which influence the development of priorities for sport and active lifestyles in Dudley.

2.2 The following review summarises the most relevant elements of national and local policy that influence the development of the strategy and the changing trends in sports participation and facility development, which will shape future needs and priorities.

National - Sport England Strategy – 2012-2017

2.3 By 2017 Sport England wants to have transformed sport so that it becomes a habit for life for more people and a regular choice for the majority. Their primary outcome is to see a year on year increase in the proportion of people playing sport once a week for at least 30 minutes. There is a particular focus on 14-25 years including reducing the number of people dropping out of sport. Sport England's goals for 2012-17 include:

- Every one of the 4,000 secondary schools in England will be offered a community sport club on its site with a direct link to one or more NGBs, depending on the local clubs in its area.
- County sports partnerships will be given new resources to create effective links locally between schools and sport in the community.
- All secondary schools who wish to do so will be helped to open up, or keep open, their sports facilities for local community use and at least a third of these will receive additional funding to make this happen.
- At least 150 further education colleges will benefit from full-time sports professional who will act as a College Sport Maker.
- Three quarters of university students aged 18-24 will get the chance to take up a new sport or continue playing a sport they played at school or college.
- A thousand of the most disadvantaged local communities will get a Door Step Club.
- A further £100m will be invested in facilities through 'Places People Play' for the most popular sports.
- A minimum of 30 sports will have enhanced England Talent Pathways to ensure young people and others fulfil their potential.

National Governing Body (NGB) 2013-17 funding

2.4 NGB 2013-17 funding is the centrepiece of Sport England's strategy with over £450 million to be invested in work with NGBs. Young people (14-25 years old) will benefit from 60% of this investment. Programmes will include helping young people move from school sport into club sport and working with universities and colleges to create more sporting opportunities for students. Additional funding will be available to governing bodies that are successfully increasing participation.

2.5 The strategy sits within the context of the Councils recently adopted Physical Activity and Sport Strategy 2015 – 2019 '*Let's Get Dudley Active. Our Vision is to create a Physically Active and Sporty Dudley'* and this strategy and management options assessment will deliver on our mission of '*Transforming Dudley to be one of the leading areas for physical activity and sport in England'*

2.6 There are however significant challenges in Dudley in delivering the above and new and innovative ways of doing things will be required:

- Only 29.9% of adults (14plus) take part in sport at least once a week compared to national average of 36.7%
- 18.5% participate 3 times per week compared to national average of 26%
- 36.7% of adults are inactive, 49.1% of adults who are inactive want to take part in sport
- £6.0m is the estimated health cost of inactivity to Dudley
- Sport is big business in Dudley – total direct economic value of sport is £63.2m
- £95.6m is the economic value of improved quality and length of life plus health care costs avoided.

2.7 It is evident nationally that the focus on increasing participation, links to the local priorities of improving health and well-being through more active lifestyles and widening access to sport. The need to develop a fit for purpose network of facilities to achieve this across the borough is therefore central to the strategy. As set out in the Council's brief the vision for the work is to develop:

'A high quality 'fit for purpose' service which can meet the future health and physical activity needs and challenges of Dudley residents for the long-term.'

2.8 The *'Dudley Physical Activity Strategy Performance Framework'* sets out ambitious targets for the borough going forward in terms of addressing the participation and inactivity challenges. Targets for 2019 include once a week participation levels to increase to 34.4% and inactivity levels to reduce to 32.7%.

2.9 It is acknowledged that indoor space and facilities are not the only solution to driving sports participation. Flexible outdoor spaces provide significant opportunity and it is important that the role of outdoor and green spaces in increasing participation and encouraging healthy lifestyles amongst residents is considered? Similarly as the nature of sports participation and demands on facilities are changing, so is the nature of provision itself. However swimming remains the number one participation sport in Dudley and reductions in provision may not help the authority in its drive to increase participation and tackle health issues.

2.10 Growth is also key the Black Country Joint Core Strategy was adopted in 3 February 2011 and forms the basis of the Black Country Authorities' Local Development Frameworks and identifies Brierley Hill as a sub-regional strategic centre with a population of approximately 80,000 which will significantly increase with the introduction of 3,000 new homes and 15,000 new jobs. Furthermore, to meet the demand for housing, the council is proposing to allocate sites across the Borough to accommodate over 16,000 new dwellings over the plan period (up to 2026).

2.11 Set out in Table 2.1 overleaf is further detail on the key local drivers, which set this context.

Table 2.1: key strategic drivers in Dudley

<table>
<tr><th>Main content document</th><th>Key points for the Dudley indoor sports facilities strategy</th></tr>
<tr><th colspan="2">Black Country Core Strategy February 2011</th></tr>
<tr><td>The four Black Country Authorities Dudley MBC, Sandwell Council, Walsall Council and Wolverhampton City Council adopted the Black Country Core Strategy in February 2011.

The Core Strategy sets out the spatial planning document with the vision, objectives and strategy for future development in the Black Country to 2026. The Core Strategy DPD forms the basis of Black Country Authorities' Local Development Frameworks, replacing certain policies in Unitary Development Plan and sets the planning policy context for the preparation of local development documents and supplementary planning documents. Plus providing the basis for decisions on planning applications, the Core Strategy will also shape regeneration, investment, and growth within the Borough.

The key overarching content of the strategy relating to the indoor facilities project and in particular changes in demand supply and access are:

• It identifies Brierley Hill as a sub-regional strategic centre with a population of approximately 80,000 which will significantly increase with the introduction of 3,000 new homes and 15,000 new jobs.
• The council is proposing to allocate sites across the Borough to accommodate over 16,000 new dwellings over the plan period (up to 2026). The Borough's main settlements are Dudley, Brierley Hill, Stourbridge, Halesowen and Sedgley.

The key spatial objective (page 23) has 8 parts to it. Part 8 sets out "A sustainable network of community services, particularly high quality lifelong, learning, health care and sport and recreation facilities, which are easily accessible To all residents at a neighbourhood level, resulting in an increase in levels of wellbeing (page 23).

The spatial objective is supported by core policy ENV 6 which concerns open space sport and recreation (page 146 -7).</td><td>The core strategy does recognise the importance explicitly in policy of the need, value and importance of indoor sports and recreational facilities. This is in contributing to the health and wellbeing objectives for residents and providing opportunities for participation.

The core strategy sets out the need to resist development where there is a potential loss of provision but there can be development to allow for compensatory provision - so long as it improves quality, does not result in a loss of accessibility or quantity.

The core strategy sets out the requirement for each local authority to develop its own development plan polices for indoor sport and recreation to comply with the Core Strategy and meet the requirements of national planning policy (reference to PPG 17 now withdrawn)

The core strategy is setting the spatial policy framework for the indoor sports facility strategy requirements and outputs. In particular the project must:

• Develop an evidence base which follows and is compliant with the NPPF and uses the Sport England methodology for assessing needs and opportunities (ANOG issued in 2013). This it is doing.
• Develop a baseline assessment of need (2014 -15) which sets out the quantity, quality, access and availability of indoor sports facilities. This predominately relates to swimming pools, sports halls, indoor tennis, athletic tracks and indoor bowling given their significance in terms of scale of provision, levels of participation and which are of main interest to the Council as a provider and operator.
• Project this baseline assessment of need to 2026 to take account of changes in demand from the projected levels of housing growth, allocations and locations. In effect, project forward and determine future needs in terms of quantity changes and if there is need for new provision and if so the scale and key locations to maintain access for residents. This needs to be a spatial assessment as much as a quantified assessment.

The key requirement of the indoor sports facility strategy will be to develop the evidence base that sets out current and future needs and allows the development of local planning policy based on the evidence base.</td></tr>
</table>

Main content document	Key points for the Dudley indoor sports facilities strategy
Key points are: • Development which results in the loss of the value of sport and recreation and open space will be resisted • Each local authority will develop its own evidence base for the op, sport and recreation requirements. As a direction there can be a loss in the quantity of provision, if there is compensatory provision of a greater value and with the same accessibility can be achieved • Expand the use of education based facilities for wider community use this for open space use, sport and recreation • Reference to each authority developing their own requirements based on the Core strategy requirements and national planning policy • Local provision should also seek to increase participation as rates are low across the Black Country • The justification for policy ENV 6 focuses very much on open space and playing fields in references to quantify – seems ok but very variable in quality and access.	Also to set out a quantified assessment of need based on the population growth and housing growth up to 2026 and beyond. To achieve this last output it will be necessary to undertake bespoke application of Sport England's facility planning model for swimming pools and sports halls.
Dudley Physical Activity and Sport Strategy 2014 – 2019	
The strategy sets out the direction for "turning the tide" on rising levels of physical inactivity in Dudley. It is recognised that there are increasing pressures on existing services, limited opportunities to access new funding and consequently a need for a co-owned approach to planning and delivery. The strategy is ambitious in setting an agenda focusing on the ambition of placing Dudley as a leading area for physical activity and sport. Attention is focused on what is needed to increase and sustain participation to meet participation rates to those of comparator authorities so as to meet the average level of adult participation for England. Progression of the strategy will be by Dudley Council working with the Physical Activity and Sport Commission who will steer the implementation, accountability and ongoing scrutiny of the strategy. Measurement over the five year life of the strategy will be against:	The strategy focuses on increasing adult and young people's participation for a health benefit and creating an active lifestyle. The strategy draws upon extensive participation and non-participation data in the Black Country Cradle to the Grave Evidence base for Sport and Physical Activity Report for Adults and Children (2014) to set out the profile of participation now and thereby the baseline and the targets for improvement. The indoor sports facilities strategy is effectively part of the means to achieving the objectives of the PA and sport strategy. It will be important in developing the evidence base and the proposals for future provision to take account of the targets set by the strategy and that the changes in provision and also programming of facilities does contribute to meeting the targets set for increasing participation in Dudley.

<table>
<tr><th>Main content document</th><th>Key points for the Dudley indoor sports facilities strategy</th></tr>
<tr><td>12,715 less adults (16 years plus) reporting an inactive lifestyle and taking up physical activity
14,749 more adults participating in at least one sport session per week for at least 30 minutes
6,612 less adults reporting no sporting activity per week
9,663 more adults achieving 150+ minutes of physical activity per week
2,875 more primary school children and 2,320 more secondary school aged children participating in physical activity and sport on 3+ days of the week for at least an hour.</td><td></td></tr>
<tr><th colspan="2">Dudley Unitary Development Plan Adopted 2005
Dudley (Emerging) Development Plan Document</th></tr>
<tr><td>Policy LR 6 of the 2005 UDP is a saved policy. Policy LR 6 seeks to protect built sports facilities where there is an identified need. The policy will be monitored through the development control process and the sport and leisure strategy.

Policy LR 7 of the UDP (not sure if it is a saved policy) says there will not be change of use for a major leisure facility unless a comparable facility for which there is demand can be provided. The policy will be monitored through the development control process and the sport and leisure strategy.

Dudley Council's emerging Dudley Borough Development Strategy Development Plan Document (DPD) contains an emerging protection of sports and recreation facilities policy. However, this document currently carries no weight as a material planning consideration to assess planning applications and will not begin to gather weight until after the Publication Stage version of this DPD document is produced. Publication Stage version is anticipated to be subject for public consultation during Summer 2015. The DPD is not anticipated to be adopted until early spring 2016. The current material planning consideration for assessing planning applications is saved UDP Policy LR6 Development Plan document.</td><td>The new evidence base will identify for each facility type the supply and demand in 2015 and projected forward based on future demand. The strategy will set out for existing facilities where there is need to continue to protect, facilities that need to be enhanced or where there is need for new provision. This may also include some re-provision of existing facilities on the same or new sites. The process does comply with policies LR 6 and 7.

The same process will apply to and inform the emerging DPD.</td></tr>
</table>

Main content document	Key points for the Dudley indoor sports facilities strategy
Black Country Be Active Cradle to Grave Evidence Base for Sport and Physical Activity 2014	
This is an evidence base report in two parts with one part for adults and one part for young people. It was produced by the Black Country Sports Partnership/Consortium. It is a primary research evidence report for physical activity and sport, particularly targeting preventative health. It applies its own calculations on the potential savings to public health and other sectors as a result of increasing participation. It sets out available products and programmes. It has been designed specifically for the Black Country and the key stakeholders working in the area. The application of the evidence base report is in advocating for investment into sport and physical activity. It also provides evidence to support organisations to develop evidence based best practice and make a robust business case for investing in physical activity and sport. Finally it can be used to support organisations in determining where and how to invest funding to maximise value for money. The evidence base focuses on health and wellbeing outcomes for example the Public Health participation objective for adults to participate in 150 minutes (2.5 hours) of moderate physical activity per week in bouts of 10 minutes or more (e.g. 5 x 30 minutes) or 75 minutes of vigorous activity per week or combinations of the above. Undertake physical activity that improves muscle strength twice a week. The report then sets out for each authority the Active People data for adults on the current levels of sport and physical activity using a number of measures so as to show the baseline levels of activity and how this has changed over the APS years. The evidence base then profiles the makeup of the participation in each authority by extensive use of the Sport England market segmentation data. It sets out the priority locations for increasing participation by areas and for which segments in these areas and relates this to the priority locations for health inequalities and which segments are most dominant in these areas.	The evidence base is primary research and it is extensive and impressive in its use of data and evidence to set out what the profile of participation is like now as a baseline and how evidence can be applied for specific health outcomes. This evidence base draws on the same evidence base sources which we will apply in the development of the evidence base for the indoor sports facilities strategy, as set out in subsequent sections. Namely the Sport England Active People and market segmentation data on adult participation levels and the profile of participation by market segments, numbers, locations, sports of greatest interest/participation, motivations and barriers to increased participation. In effect, it is the same evidence sources but the work of the indoor facilities strategy will be to relate the evidence to specific sports facilities. Then relate the participation profile to the evidence base findings for each facility type. The latter will draw on other sources of data, notably Active Places Power and specific participation and frequency rates for rates for participation in swimming and hall sports. The Black Country evidence base is a cross check and additional source of evidence for us to use in compiling the evidence base for the indoor sports facility strategy.

Main content document	Key points for the Dudley indoor sports facilities strategy
The final output is to set out how this information can be applied by local authorities, governing bodies and clubs.	
Dudley Health and Wellbeing Strategy 2013 - 2016	
The aim of the strategy is to improve the health and wellbeing of people in Dudley borough and to reduce health inequalities. The strategy aims to answer three key questions. Firstly, to show how different factors affect health and wellbeing across our whole life-course and how our environment and communities affect our health and wellbeing. Secondly, to show what the priorities for health and wellbeing are for Dudley borough. Thirdly to show how the strategy will be implemented and progress monitored. The strategy describes what is meant by health and wellbeing. It sets out 5 priorities areas of work and the views of local people that have helped shaped the strategy	The strategy is about improving the health and wellbeing of Dudley residents. It is an important reference document for the indoor sports facilities strategy. In particular at the strategy option development stage of considering changes in facility provision and identifying which facility types are going to have the biggest impact in increasing participation for a health benefit? This is very likely to be swimming pools because of the cradle to grave participation and across both genders. Also gym facilities because of the wide age and genders profile of participation in gym.
Dudley Facility Planning Modelling 2009	
The facility planning model (fpm) assessment in 2009 was for swimming pools and sports halls. It identified the current demand and supply and access to these facility types and provided an assessment of future requirements, scale and location.	The indoor facilities strategy project steering group decided not to use this evidence base in the project. The reasons being it is five years old and the supply base for each facility types has changed considerable in the five years, especially in Sandwell, Walsall and Birmingham. Furthermore the population data used in this study was from the 2001 Census with projected population changes up to 2009, making it a very old population profile however what it highlighted at the time was the significant shortfall in swimming pool provision.

2.12 Alongside the key drivers set out there is also a changing landscape for local sport and leisure provision which is also relevant.

Changing Participation Trends

2.13 Sport England's recently published research into how we participate in sport *'How we play: the habits of community sport'* provides an insight into the nation's sporting habits. It appears habit is the key word and the plentiful and accessible supply of good quality opportunities appears to provide the key. The report also found that friends and social influences are also critical to participation, as is flexibility in the sporting offer. All national governing bodies are being challenged by Sport England to develop new flexible forms of the game to attract and retain participants. Developing non-traditional forms of sport in non-traditional settings is changing the facility provision picture. National Governing Bodies of Sport (NGBs) are reflecting these trends of making sport more accessible and easier to access and enter by developing alternative and flexible forms of their sports aimed at lapsed participants and new entrants. Return to Netball and Rugby reflect two recent high profile campaigns. Door Step sports clubs and the rise of local Park Runs are further extensions of the move towards local accessible activity based opportunities, which do not rely on traditional forms of facility provision.

2.14 Traditional sports halls and swimming pools, whilst still an important part of the provision jigsaw, are therefore no longer the panacea. Swimming participation is declining nationally being replaced by more class based activity, such as zumba, circuits and yoga etc. This provides both a challenge, in terms of addressing the current stock, and an opportunity for local providers. What is clear is that it presents an opportunity for providers to think differently and look at more flexible forms of local provision to meet new participation needs. In any rationalisation of facilities across Dudley future provision may look at alternative facilities rather than for example traditional sports halls.

2.15 Indoor space is also not the only solution to driving sports participation. Flexible outdoor spaces provide significant opportunity and it is important that other strategies across the authority recognise the role of outdoor and green spaces in increasing participation and encouraging healthy lifestyles. Dudley is undertaking significant health development work in the Parks setting.

2.16 As the nature of sports participation and demands on facilities are changing, so is the nature of provision itself.

Facility Trends

2.17 The boom period for public sector sport and leisure provision is generally thought to have been in the mid 1970's and early 1980's. During this period, the Local Authority sector was in the vanguard of community recreation provision, through the policies and influence of Sport and Leisure Departments. Whilst the building activity of the 70's and 80's has resulted in the development of a good network of community sports facilities it is clear that the pattern of facility provision is changing, increased financial pressures is putting a strain on sports facility provision and much of the nations facility stock is now ageing and in need of reinvestment.

2.18 Sport England commissioned State of the Nation reports on facilities across England in 2012 to capture what was happening with the nation's sports facility stock. A number of key issues emerged, particularly the importance of education based provision, where 76% of all the nations sports halls and 72% of artificial grass pitches (AGPs) were found to be on education sites. In terms of swimming pools the State of the Nation reports found that 58% of the total pool stock in England has not been refurbished, given 33% of our pool stock was built during or before the 1970s and is now well over 30-years old, this represents a significant challenge.1

2.19 The education sector is increasingly important in developing a lifelong habit in sports participation, and is clearly critical providers of facilities. Current education based programmes include the Schools Games, opening up of secondary schools and the work with the FE sector on the College Sport Maker initiative, which is challenging the participation drop-out in the 18-24 age group. Other partners, private and voluntary sector are also increasingly important providers of local sports facilities and opportunities. State of the Nation found that 33% of the swimming pool stock in England is provided by the commercial sector.

2.20 The local facility network is now therefore varied and provision reflects a multi-partner approach. The HE sector is particularly active across Dudley, so whilst local authorities remain central to local sports planning, new and innovative partnerships alongside changes in participation and facility provision will impact on future needs and priorities.

New Partnership Working and Delivery

2.21 Councils are likely to move away from being providers to enablers and facilitators, local communities will therefore need to be more resilient and learn to further help themselves. Community Asset Transfer is one way that provision can be sustained and enhanced. The potential is currently being explored in the context of the Dell Stadium.

2.22 The Local Authority sport services is likely to change dramatically over the next few years; with the ever decreasing funding available, more commercial and entrepreneurial methods will need to be developed and remaining inefficient buildings (often in high areas of deprivation) will be under more pressure to close, if they haven't already. Reinvesting in fit for purpose facilities (especially swimming pools) will be made all the harder by councils requiring savings to meet their budget pressures.

2.23 Dudley Council is facing these financial pressures. There is a Budget Challenge on-going in the Council and it is evident that any changes in the leisure infra-structure and new management arrangements must lead to improved financial performance. The recent Cabinet Paper set out the results of the Public Consultation 2015/16 on *'The Big Questions'* setting out the relative importance of service areas. Leisure Centres and Sports Development featured relatively low in overall priority but stood up well in comparison to other non-statutory services. Whilst consultation with the Council's Cabinet (set out in section 7) confirmed the Council were keen to see change and service development it is evident that the strategy will need to have financial considerations to the fore.

2.24 Strong local leadership will be essential and councils will need to continue providing strategic direction for sport and physical activity development at a local level. They are best placed to do this, however Councils can no longer do it alone. The health and wellbeing agenda will be key and will provide opportunities to sustain, develop and integrate services by sport and leisure working with Adult Social Care and Public Health. The Clinical Commissioning Group (CCG) is leading this agenda on a co-ordinated basis across the borough.

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[1] Sport England, State of the Nation, Swimming Pools in England, July 2012

2.25 New provision cannot therefore be developed in isolation. There are some really exciting examples of service integration, linking together themes of health and physical activity and which recognise a multi-agency approach and the new participation and facility trends.

Summary of Context and Key Drivers

- Dudley lags behind in terms of sports participation levels. There are high levels of inactivity leading to significant health challenges.

- The 'Dudley Physical Activity Strategy Performance Framework' sets out ambitious targets for the borough going forward in terms of addressing the participation and inactivity challenges. Targets for 2019 include once a week participation levels to increase to 34.4% and inactivity levels to reduce to 32.7%.

- Nationally the focus on increasing participation, links to Dudley's aspirations for improving health and well-being through more active lifestyles and widening access to sport.

- The need to develop a multi-provider *'fit for purpose'* network of facilities to achieve this across the borough is therefore central to this strategy and significant change will be required in how Dudley provides and delivers its sports facility offer to impact on the low levels of sports participation.

- Key areas of the borough will be affected by potential housing growth, as set out in the Core Strategy this is therefore likely to increase demand for indoor sport facilities across these areas. If participation is also to increase this will place further demands on the existing Dudley Facility stock. These issues will need to be modelled in any future scenario.

- Developing non-traditional forms of sport in non-traditional settings is changing the facility provision picture. Door Step sports clubs and the rise of local Park Runs are evidence of the move towards local accessible activity based opportunities, which do not rely on traditional forms of facility provision.

- Traditional sports halls and swimming pools, whilst still an important part of the provision jigsaw, may therefore no longer the panacea. These changes present an opportunity for providers to think differently about future needs and look at more flexible forms of local provision to meet new participation needs.

- The local facility network is now varied and provision reflects a multi-partner approach, with education particularly to the fore.

- Whilst local authorities remain central to local sports planning, new and innovative partnerships alongside changes in participation and facility provision will impact on future needs and priorities.

- Indoor space is also not the only solution to driving sports participation. Flexible outdoor spaces provide significant opportunity and it is important that other strategies across the Borough recognise the role of outdoor and green spaces in increasing participation and encouraging healthy lifestyles.

- Reinvesting in 'fit for purpose' facilities will be made all the harder by councils requiring savings to meet their budget pressures. Dudley Council is facing these financial pressures and although the Council appear keen for change leisure does not appear to be a significant priority for residents. This is where there needs to a coming together of strategy and future service delivery.

- New provision cannot therefore be developed in isolation. There are some really exciting examples of service integration, linking together themes of health and physical activity and which recognise a multi-agency approach and the new participation and facility trends.

2.26 To understand how these drivers play out in Dudley and what they mean for future needs and priorities it is important to understand the supply and demand picture. Set out next is the hard evidence findings for each facility type, starting with swimming pools.

Introduction

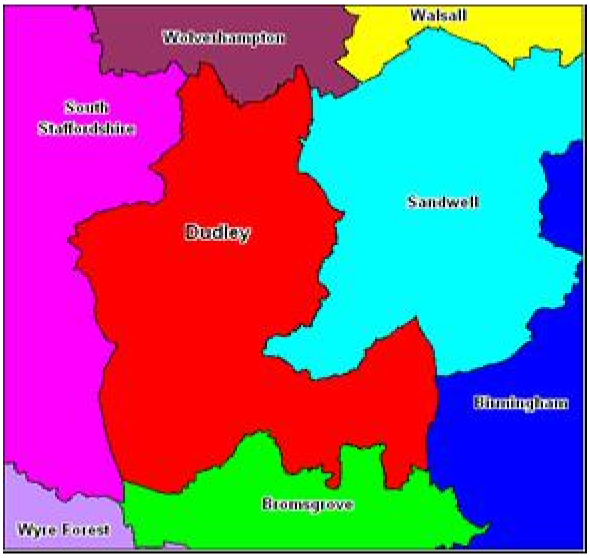
3.1 In 2009 Dudley Council undertook an extensive analysis on the provision of swimming pools based on application of the Sport England facility planning model (fpm). The findings from that report have been reviewed in compiling this report. It is considered that the fpm a report produced in 2009 does not provide an up to date evidence base for the preparation of the Council's new facilities strategy.

3.2 Mainly because the swimming pool provision in boroughs such as Sandwell and Walsall and in Birmingham City has changed significantly since 2009. That will most likely influence how demand is distributed across all authorities and pull more demand out of Dudley based on the new pools in these areas being comparatively more attractive to Dudley residents who live within the catchment area of their location.

3.3 Consequently it is important to develop a new and up to date 2014 evidence base for swimming based on the 2014 supply of pools and the demand for pools across Dudley and all neighbouring authorities. The data used in this assessment is the same fpm data headings as was used in the 2009 fpm report, just it is 2014 and not 2009 data.

3.4 A map of the authorities included in the compilation of this supply, demand and access evidence base for pools is set out as map below.

Map 3.1: Map of the Dudley and surrounding local authorities in the study area for the assessment of need for swimming pools 2014



Definition and terms

3.5 The measure and terminology applied for supply, demand and capacity for both swimming pools and sports halls is visits per week in the peak period. (Note: now referred to as either visits or visits per week). To be included in the Sport England assessment the minimum size for a swimming pool is of at least 160 sq metres of water (a 20m x 4 lane pool). All pools of this minimum size are included in the list of supply but they are only included in the assessment if they are available for public and club use in some or all of the weekly peak period.

3.6 A list of all swimming pools across the local authorities is set out in the Appendix to this report.

Quantity - Supply

Table 3.1: Swimming pool supply Dudley and neighbouring local authorities 2014

Total Supply	Dudley	Birmingham	Bromsgrove	Sandwell	South Staffordshire	Walsall	Wolverhampton
Number of pools	10	45	5	7	4	17	13
Number of pool sites	7	33	4	4	4	14	7
Supply of total water space in sqm	2509.6	9700.9	1143.9	1612.5	1032.5	4150.9	2630.7
Supply of publicly available water space in sqm (scaled with hrs avail in pp)	2083.7	7425.8	932.5	1110.8	746.7	3551.1	2036.0
Supply of total water space in VPWPP	18058	64357	8082	9627	6471	30776	17645
Waterspace per 1000 pop'n	7.93	8.79	12.01	5.09	9.46	15.2	10.4

3.7 Dudley has 10 swimming pools on 7 sites. Excluding Birmingham it has the highest supply of pools and pools sites of the neighbouring authorities. It also has the highest total supply of waterspace at 2,509 sq metres of water. (Note for context a 25m x 4 lane pool is 212 sq metres of water).

3.8 The total water area of the 10 swimming pools in Dudley is 2,509 sq metres of water. However when this is assessed based on the amount of waterspace available for community use this reduces to 2,083 sq metres of water. So there is 426 sq metres of water, or, 16.9% of the total water area which is not available for public use in the weekly peak period. This is waterspace in commercial swimming pools which is not accessible for public use. The details of each of the swimming pool sites are set out in Table 3.2 overleaf.

3.9 The breakdown of provision is 5 public swimming pool sites of which 2 are school small pools at Summerhill School 200 sq metres of water and Crestwood School at 120 sq metres of water. There are 2 commercial swimming pool sites at the David Lloyd Club which is a large pool of 375 sq metres of water and Velocity Health and Fitness at 250 sq metres of water.

3.10 Based on a comparative measure of waterspace per 1,000 population Dudley's provision after Birmingham is perhaps surprisingly not the highest. Dudley has 7.9 sq metres of water per 1,000 population, whereas Walsall with its 17 pools on 14 sites has 15.2 sq metres of water per 1,000 population. Walsall has a population of 273,158 people compared with 316,615 population in Dudley.

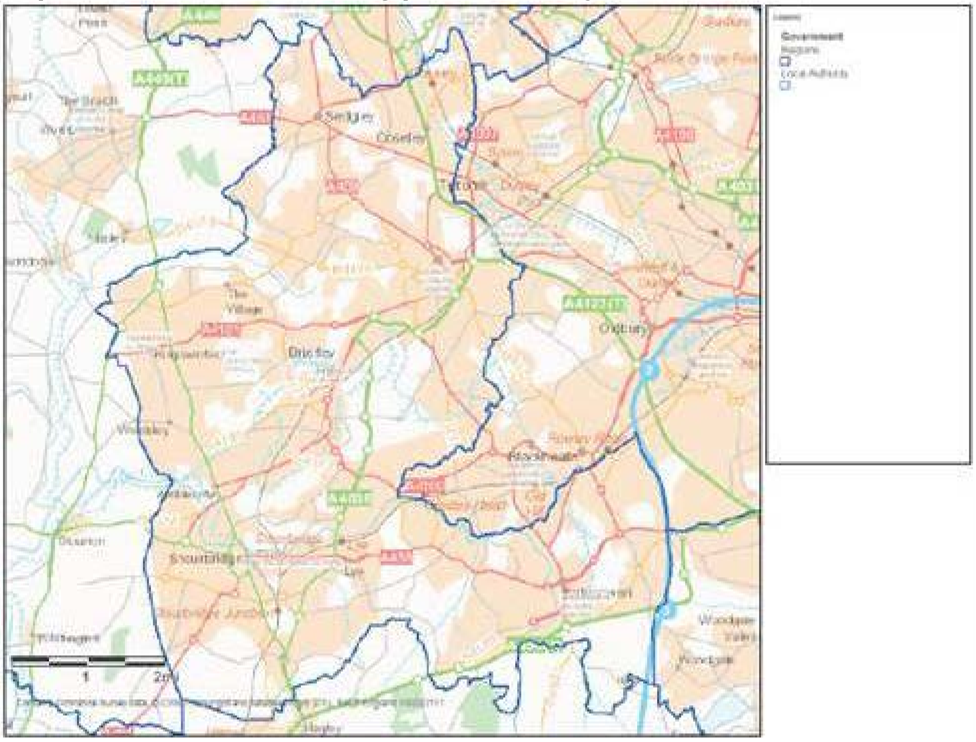
3.11 Sandwell has the lowest provision at 5.1 sq metres of waterspace per 1,000 population.

Table 3.2: List of all swimming pool sites and size of pools in Dudley Borough 2014

Name of facility	Type	Area	Public/Commercial
DUDLEY			
CRYSTAL LEISURE CENTRE	Leisure Pool	480	P
CRYSTAL LEISURE CENTRE	Main/General	250	
DAVID LLOYD CLUB (DUDLEY)	Main/General	375	C
DUDLEY LEISURE CENTRE	Main/General	250	P
DUDLEY LEISURE CENTRE	Learner/Teaching/Training	50	
HALESOWEN LEISURE CENTRE	Main/General	400	P
HALESOWEN LEISURE CENTRE	Main/General	135	
SUMMERHILL SCHOOL	Main/General	200	P
THE CRESTWOOD SCHOOL	Main/General	120	P
VELOCITY HEALTH & FITNESS (BIRMINGHAM DUDLEY)	Main/General	250	C

3.12 The location of the Dudley swimming pools in blue typeface is set out in map 3.2 below. (Note: it is acknowledged the map does not clearly identify the pool locations and work to improve the map quality is underway)

Map 3.2: Location of swimming pools in Dudley 2014



Quantity – supply and demand balance

3.13 The overall supply and demand balance findings for swimming pools are about quantity of provision and whether there is a surplus of deficit in swimming pool quantity. Supply and demand balance is based on the assumption that all the demand for swimming in Dudley Borough is met by all the swimming pool supply in the Borough. So it does not take account of the location, catchment area, type of pool, quality of pools and whether residents are choosing to go to pools outside the borough based on pools in neighbouring authorities being more modern.

3.14 The reason for presenting this closed assessment of all the Dudley demand going to Dudley's pools is because some local authorities like to see how their demand for swimming matches their own supply of pools and supply and demand balance presents this assessment.

3.15 Also a closed assessment can be compared with how demand is re-distributed when it is based on the location and catchment area of pools and the Dudley demand being distributed to the nearest pools to where residents live. In short does Dudley import more demand than it exports or vice versa and by how much? These findings are set out under the access and availability headings.

Table 3.3: Supply & demand balance 2014 in Dudley and neighbouring authorities 2014

Supply/Demand Balance	Dudley	Birmingham	Bromsgrove	Sandwell	South Staffordshire	Walsall	Wolverhampton
Supply - Swimming pool provision (sqm) based on hours available for community use	2083.7	7425.8	932.5	1110.8	746.7	3551.1	2036.0
Demand - Swimming pool provision (sqm) taking into account a 'comfort' factor	3326.4	12165.6	967.0	3438.9	1107.9	2914.5	2705.2
Supply / Demand balance - Variation in supply provision compared to the minimum required to meet demand.	-1242.72	-4739.81	-34.55	-2328.07	-361.22	636.54	-669.27

3.16 When looking at the overall supply and demand across Dudley, the resident population is estimated to generate a demand for a minimum of 3,326 sqm of waterspace. This compares to a current available supply of 2,083 sqm of water space, in the weekly peak period of weekday evenings and weekend days for public and club use.

3.17 So overall for Dudley there is a negative supply/demand balance of -1242 sqm of waterspace in 2014. This is a very high negative balance and is the equivalent of nearly 6 swimming pools each of 25 metres x 4 lanes.

3.18 This closed assessment of supply and demand balance will change when the assessment is based on the location and catchment area of pools in neighbouring authorities and the Dudley demand accessing pools in neighbouring authorities.

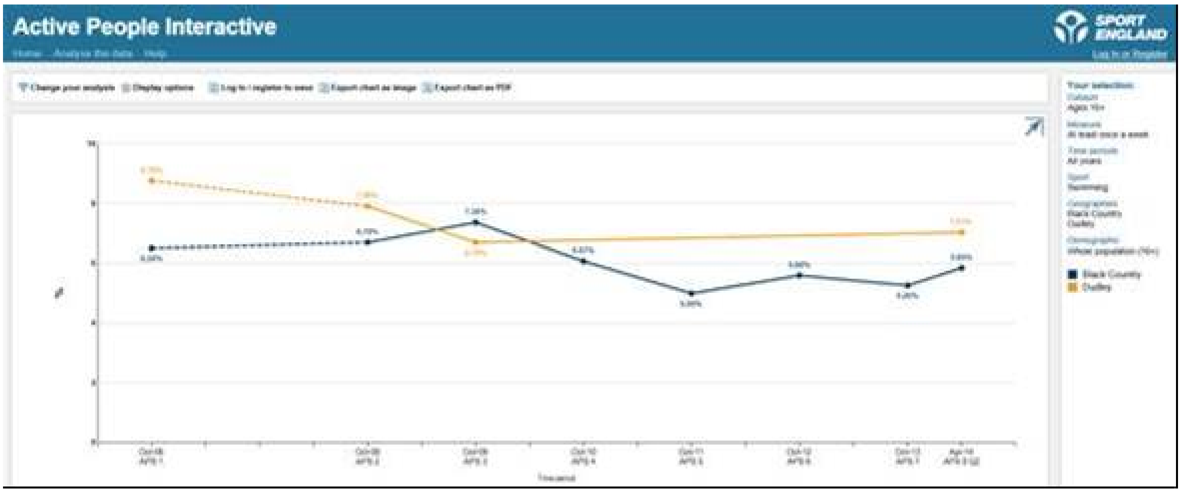
3.19 This will however be constrained because there is a negative supply and demand balance in all authorities. Excluding Birmingham the highest is in Sandwell at 2,328 sq metres of water and the lowest is in Bromsgrove at 34 sq metres of waterspace.

Quantity demand and participation

3.20 Participation in swimming (as a proxy for demand) has declined in Dudley over the period of the Active People surveys 2006 – 2014. The once a week adult participation rate for swimming in Dudley and for comparison the Black Country is set out below for the period of the Active People surveys 1 – 8 from 2006 – April 2014. This shows a rate of 8.7% of Dudley adults swimming at least once a week in 2006 (blue line) and 7% in 2014. (Note: the reason for the straight line participation rate between 2009 and 2014 is because of an insufficient response rate in the sampling to provide an actual rate for each individual year).

3.21 The rate of swimming participation in Dudley has been higher than for the Black Country (yellow line) which had 6.5% of Adults swimming at least once a week in 2006 and is 5.8% of adults in April 2014.

Chart 3.1: Rate of adult once a week participation in swimming in Dudley and the Black Country 2006 - 2014



3.22 The market segmentation map and chart for swimming participation across Dudley is set out in Map 3.3 and Chart 3.2 overleaf. The map shows a universal rate of between 10.1% - 20% of the Dudley population who swim at least once a month.

3.23 The market segmentation population chart shows that there are 14 segments ranging from Chloe (shaded purple and 3rd segment) to Brenda (salmon pink) where there are over 1,500 people in each segment who swim at least once a month. The total market segmentation population for swimming is 32,314 people.

Map 3.3: Percentage of the Dudley population who swim at least once a month

Chart 3.2: Market segmention profile for swimming participatuion in Dudley

Summary assessment of QUANTITY of swimming pool provision

3.24 The summary assessment of findings on quantity of swimming pool provision are that:

- demand for swimming in Dudley exceeds supply by 1, 242 sq metres of water. This is based on an assumption that <u>ALL </u>the demand for swimming in Dudley goes to the swimming pools in Dudley;

- when the assessment is based on <u>the catchment area of the pools</u> and the Dudley demand going to the nearest pool to where residents live – so demand traveling across local authority boundaries - then the Dudley demand exceeds supply by a much lower 344 sq metres of water. (For context a 25m x 4 lane swimming pool is 212 sq metres of water);

- this means that Dudley is a net exporter and quite a lot of the Dudley demand for swimming is being met at pools located in neighbouring authorities (assumption being residents travel to the nearest pool to where they live);

- Dudley has 7 swimming pool sites. There are 3 pubic leisure centres providing the full range of swimming activities. There are 2 small school swimming pools and there are 2 commercial swimming pool sites;

- Halesowen and Dudley have main pools and learner pools. Crystals has a leisure pool and a 25m pool. Unusually for the commercial sector, the David Lloyd Centre is a large pool of 350 sq metres of water, this is 50 sq metres of water bigger than the Dudley Leisure Centre;

- based on a benchmark (standard) of waterspace per 1,000 population (2014 figures) Dudley has 7.1 sq metres of water. This is the second lowest in the Black Country, with Sandwell having the lowest at 5.1 sq metres of water and Wolverhampton the highest at 10.4 sq metres of water;

- the Active People once a week measure of swimming participation shows that between 10.1% - 20% of adults in Dudley swim at least once a week; and

- the Active People market segmentation data for once a month swimming participation shows that swimming has broad based appeal with over 1,500 swimmers in each segment and across 14 segments aged between 25 and 45 swimming At least once a month.

Quality

3.25 Quality of swimming pools is assessed by Sport England as the age of the pools and the dates of any major modernisation. It is accepted that this is one only one measure of quality. The Appendix lists all the swimming pools in Dudley and the surrounding local authorities by name, the age of pools and date of any modernisation that are included in the Sport England database.

3.26 Set out below is Table 3.4 which is a summary of the Dudley pools by age and with the decade of any modernisation.

Table 3.4: Age and modernisation of swimming pools by decade in Dudley 2014

Name of facility	Type	Area	Year built	Year refurbished
DUDLEY				
CRYSTAL LEISURE CENTRE	Leisure Pool	480	1990	
CRYSTAL LEISURE CENTRE	Main/General	250		
DAVID LLOYD CLUB (DUDLEY)	Main/General	375	2001	
DUDLEY LEISURE CENTRE	Main/General	250	1978	2004
DUDLEY LEISURE CENTRE	Learner/Teaching/Training	50		
HALESOWEN LEISURE CENTRE	Main/General	400	1963	
HALESOWEN LEISURE CENTRE	Main/General	135		

Name of facility	Type	Area	Year built	Year refurbished
SUMMERHILL SCHOOL	Main/General	200	2003	
THE CRESTWOOD SCHOOL	Main/General	120	1958	
VELOCITY HEALTH & FITNESS (BIRMINGHAM DUDLEY)	Main/General	250	2000	

3.27 As the table shows the stock was built between 1958 when the Crestwood school pool opened and the most recent pool being Summerhill School Pool opened in 2003.

3.28 The public leisure centre pools were opened between 1963 when the Halesowen Leisure Centre Pool opened and the most recent being in 1990 when the Crystal Leisure Centre pool opened, with the Dudley Leisure Centre opening in between in 1978.

3.29 So overall the age range of the 3 public leisure centre pools is between 24 and 51 years of age. Overall the pool stock is therefore very old.

3.30 In terms of modernisation only one of the three public leisure centre pools has been modernised and this was the Dudley Leisure Centre pool opened in 1978 and modernised in 2004. So there are two pools the Halesowen Leisure Centre pool opened in 1963 (51 years old) and the Crystal Leisure Centre opened in 1990 (24 years old) which have not had a major modernisation.

3.31 The commercial pools at Velocity Health and Fitness and the David Lloyd Club opened in 2000 and 2001 respectively. Neither centre has been modernised, which is quite unusual for commercial centres of this age.

3.32 The relative performance of the centres also provides a measure of quality. Set out below is a benchmark of the centres current performance.

Table 3.5 –Benchmarks Comparison

FMG Benchmarks	Crystal Leisure Centre	Dudley Leisure Centre	Halesowen Leisure Centre	FMG Benchmarks
	Wet & Dry	**Wet & Dry**	**Wet & Dry**	**Wet & Dry**
Income per m2	£233	£182	£190	£256
Income per visit	£2.45	£2.37	£1.90	£3.43
Visits per m2	95	77	100	76
Income from Fitness (per stn)	£4,985	£2,535	£4,929	£7,806
Average Members per Station	21	10	22	20-25
Income per Sports Hall Court	£15,212	£16,299	N/A	£16,107
Income from Swimming per m2	£851	£827	£512	£783
Marketing as % of Income	N/A	0.03%	N/A	1.9%
Cost of Sales Margin	115.6%	190.0%	241.5%	56%
Secondary Income Per Visit	£0.04	£0.03	£0.02	£0.29
Utility Costs per m2	£56.82	£45.87	£49.34	£49.30
Maintenance Costs per m2	£7.98	£2.87	£2.38	£24.26
Staffing Costs as % of Income	100%	125%	86%	71%

3.33 It can be seen that in overall terms, visits per m2 are above benchmark, which is positive, and also income from the sports halls is above or close to benchmarks. Swimming is positive, although the market is experiencing over £1,000 per m2 from new swimming pools and where there is demand for swimming lessons. We have classified maintenance as being positive, but in reality these reflect the amount spent and not the repair and maintenance requirement. In 2013/14, maintenance budgets were purposefully underspent. Swimming income is positive at Crystal LC and Dudley LC. Secondary spend is very poor. Utilities appear reasonable to benchmark. Repairs and Maintenance are low. The staffing efficiency levels are poor especially at Dudley, but low income contributes towards this.

3.34 Sports hall performance is about average. Overall the sites are performing poorly. Despite high visits per m2, there are low income per visit levels. Low pricing is likely to be the cause. Health and fitness income is poor at all 3 sites, which again appears to be as a result of pricing.

3.35 There would therefore appear to be significant potential to improve performance at the centres. Given the age of the facilities and some of the condition issues more radical solutions may be required to improve the quality and drive participation.

Summary assessment of QUALITY of swimming pool provision

3.36 The summary assessment of quality of swimming pool provision is that:

- Dudley has an old stock of pools. The average age across all the 7 sites and from public and commercial sector providers is 27 years;
- the average age of the 3 public leisure centres is 37 years. Crystal Leisure Centre is the youngest pool and it opened in 1990;
- Dudley Leisure Centre had an extensive modernisation in 2004;
- the 2 school pools are the oldest (Crestwood School) opened in 1958 and the youngest (Summerhill School) opened in 2003 in Dudley;
- Crystal Leisure Centre and Halesowen Leisure Centre are very large sites providing 2 pools and pool sizes which can cater for the full range of swimming activities. Dudley Leisure Centre is smaller site but does have a teaching/learner pool as well; and
- the quality of pools in terms of their age and condition can be a barrier to participation. As is set out under the quantity heading Dudley's rate of swimming participation has declined over the 2006 – 2014 period).
- significant potential to improve performance at the centres. Given the age of the facilities and some of the condition issues more radical solutions may be required to improve the quality and drive participation.

Accessibility

3.37 Access to swimming pools is assessed by Sport England based on the catchment area of swimming pools and travel patterns to pools by car, public transport and walking. The Sport England data plots the catchment area of each pool and then determines the demand for each pool within its catchment area.

3.38 This means the assessment works ACROSS local authority boundaries. The assessment sends the demand to the nearest pool to where a resident lives (say authority A)and it can calculate if this pool is in the same local authority as where the resident lives (RETAINED DEMAND), or, if the nearest pool to where a resident lives is in another authority (EXPORTED DEMAND).

3.39 The assessment also calculates if a resident lives in (say authority B) but the nearest pool to where they live is in authority A then it can calculate how much demand is exported from authority B and becomes (IMPORTED DEMAND) in authority A.

3.40 The findings on access to swimming pools from the Sport England 2014 assessment are set out in Table 3.5 below.

Table 3.5: Access to swimming pools in Dudley and neighbouring authorities 2014

Satisfied Demand	Dudley	Birmingham	Bromsgrove	Sandwell	South Staffordshire	Walsall	Wolverhampton
Total number of visits which are met	18089	64951	5612	17757	6313	16824	14465
% of total demand satisfied	89.6	88	95.7	85.1	93.9	95.2	88.1
% of demand satisfied who travelled by car	82.9	68.73	87.43	75.1	87.66	69.52	72.7
% of demand satisfied who travelled by foot	7.64	16.65	8.74	10	7.89	20.48	12.65
% of demand satisfied who travelled by public transport	9.47	14.62	3.83	14.9	4.44	10	14.65
Demand Retained	11631	51024	3698	5933	2612	13391	10671
Demand Retained -as a % of Satisfied Demand	64.3	78.6	65.9	33.4	41.4	79.6	73.8
Demand Exported	6458	13927	1913	11824	3701	3433	3794
Demand Exported -as a % of Satisfied Demand	35.7	21.4	34.1	66.6	58.6	20.4	26.2

3.41 In 2014 in Dudley there is 22% of the population which does not have access to a car and this quite high percentage is going to influence travel patterns to swimming pools. Car travel is the dominate travel mode with 82.9% of all visits. The car travel catchment area is 20 minutes. Nearly 8% of all visits to pools is met by residents who walk to pools (based on a 20 minute or 1 mile catchment area), whilst travel by public transport accounts for just under 10% of all visits.

3.42 So around 18% of all visits to pools are by a combination of walking or public transport, nearly one in five visits to pools. Presumably this is by residents who do not have access to a car.

3.43 The Dudley percentages are broadly in line with the neighbouring authorities, excluding Birmingham except Dudley does have a higher travel pattern to pools using public transport

3.44 Dudley is retaining 64.3% or 11,631 visits of its own demand for pools at pools located in Dudley.

3.45 Put another way, based on the location and catchment area of the Dudley pools it means that for over six out of ten visits to a Dudley pool it is by a Dudley resident. This is based on the Dudley demand traveling to the nearest pool to where residents live.

3.46 It does also mean that Dudley is exporting some 35.7% or 6,458 visits of its own demand to pools located in neighbouring boroughs. Again based on the same assessment that the Dudley demand is traveling to the nearest pool to where residents live.

3.47 So over one in three visits to a pool by a Dudley resident is to a pool located in a neighbouring authority. This is quite a high export of demand. In part, it is because of travel to pools by car representing some 83% of all visits. So a high number of visits traveling to pools by car and based on a 20 minute car travel time catchment area this is making a lot of pools accessible to the Dudley demand – hence a high export.

3.48 It is not possible to identify from the data where the Dudley exported demand goes to. However the 2009 Dudley fpm swimming pools report does contain this data and for illustration the findings are set out below in italics.

"The largest export of demand, Dudley residents going elsewhere to swim, is to Wolverhampton, making up almost 2,000 visits per week in the peak period. Sandwell is the second largest, with 900 visit, unsurprisingly given the length of the common boundary. 200 of these 900 visits to Sandwell are by Dudley residents walking to a Sandwell pool to swim, most probably Tipton or Haden Hill. Only 50 visits of the export to Wolverhampton is on foot and all the other export is by road.

This figure of 50 visits exported on foot is significant for how small it is. Some of this will be from the North West tip of Dudley to Colton Hills in Wolverhampton and some will from the north east tip to New Bilston.

Dudley residents swim in the pools of all of the other seven boroughs in the study Area. The flow to Birmingham is the smallest of all the authorities at only 100 visits" (Source: paragraphs 2.57 – 2.60 Dudley 2009 fpm report on provision for swimming).

3.49 Unmet demand is also a measure of accessibility because it measures how much demand cannot access a pool because the pool is too full, or demand is located outside the catchment area of a swimming pool and cannot access a pool therefore. The Sport England data on unmet demand and access to pools is set out overleaf as Table 3.6.

Table 3.6: Unmet demand from Dudley residents for swimming pools which cannot access pools 2014

Unmet Demand	Dudley	Birmingham	Bromsgrove	Sandwell	South Staffordshire	Walsall	Wolverhampton
Total number of visits in the peak, not currently being met	2091	8854	255	3105	408	857	1947
Unmet demand as a % of total demand	10.4	12	4.3	14.9	6.1	4.8	11.9
Equivalent in Water space m2 - with comfort factor	344.69	1459.46	42.01	511.84	67.31	141.26	320.87
% of Unmet Demand due to ;							
Lack of Capacity -	27.9	43.4	16.2	33.5	9.2	16.4	30.0
Outside Catchment -	72.1	56.6	83.8	66.5	90.8	83.6	70.0

3.50 The total unmet demand which cannot access pools totals 2,091 visits or 10.4% of the total demand for swimming by Dudley residents. This equates to 344 sq metres of water and is considerably lower than the 1,242 sq metres of water which is the finding from the closed assessment of all the Dudley demand for swimming being met by the Dudley pools.

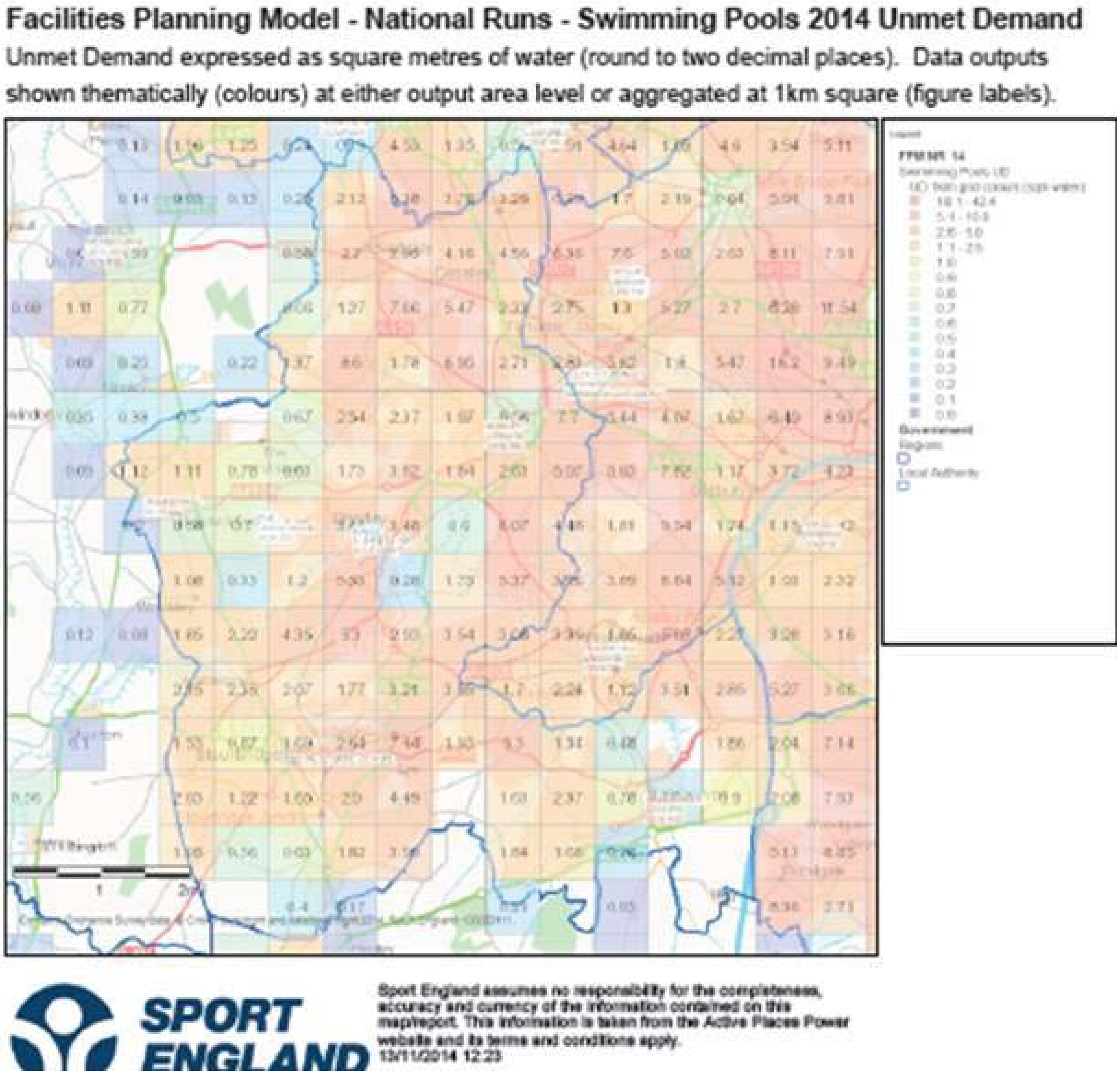
3.51 So when the assessment is based on the catchment area of pools and demand traveling to the nearest pool to which it is located, irrespective of local authority boundaries, then the unmet demand for swimming by Dudley residents becomes this 344 sq metres of water. (Again for context a 25m x 4 lane pool is 212 sq metres of water).

3.52 Most unmet demand at 72% of the total or 247 sq metres of water is from lack of access to pools from residents living outside the walk to or public transport catchment area of existing swimming pools. Of that unmet demand arising from poor access, some 82% is made up of residents who have no access to a car, i.e. would have to walk or get a bus to a pool.

3.53 Unmet demand due to lack of swimming pool capacity is 28% of the total or 96 sq metres of water.

3.54 Map 3.4 overleaf shows the scale and location of unmet demand across Dudley in one kilometre grid squares. The values in each square refer to unmet demand expressed in terms of sq metres of water. *(Note: again it is acknowledged the colour coding of the map and titling does not make the findings easy to identify. Discussion is underway with Sport England to see if the map quality can be improved).*

Map 3.4: Unmet demand for swimming in Dudley expressed as sq metres of water. 2014



3.55 The highest value squares of unmet demand have a value of between 5 – 10 sq metres of water (shaded mid orange) and there are two areas with these value squares. The first is 3 squares located south of Coseley and west of Tipton along the route of the A459. The total value of these three squares is 20 sq metres of unmet demand. The second is to the east and south of Dudley Leisure Centre where there are 4 squares with a total unmet demand value of 25 sq metres of water.

3.56 The next highest value squares of unmet demand are shaded the lightest of the three shades of orange and the unmet demand in these squares has a value of between 2.6 – 5 sq metres of water. There are 21 of these squares with a total unmet demand value of 86 sq metres of water. These value squares are dispersed across the Borough and the area of greatest concentration is located north and west of Coseley and south of the location of the David Lloyd swimming pool site.

3.57 The next value squares of unmet demand are shaded dark cream and the value of unmet demand in these squares is between 1.1 – 2.5 sq metres of water. There are 25 of these squares with a total value of 42 sq metres of water. The squares are dispersed across the Borough. The biggest concentration is around the Crystal Leisure Centre location.

3.58 After that there are around 10 squares shaded either green or blue which have an unmet demand value of between 0.3 – 1 sq metre of water as unmet demand.

3.59 All of the unmet demand described above is due to it being located outside the walk to catchment area of a swimming pool.

3.60 In summary the key locations for increasing access to pools because there is demand located outside the walk to catchment area of a pool are:

- south of Coseley and west of Tipton along the route of the A459. The total value of unmet demand in this area equates to 20 sq metres of water; and

- east and south of Dudley Leisure Centre where there is total unmet demand of 25 sq metres of water.

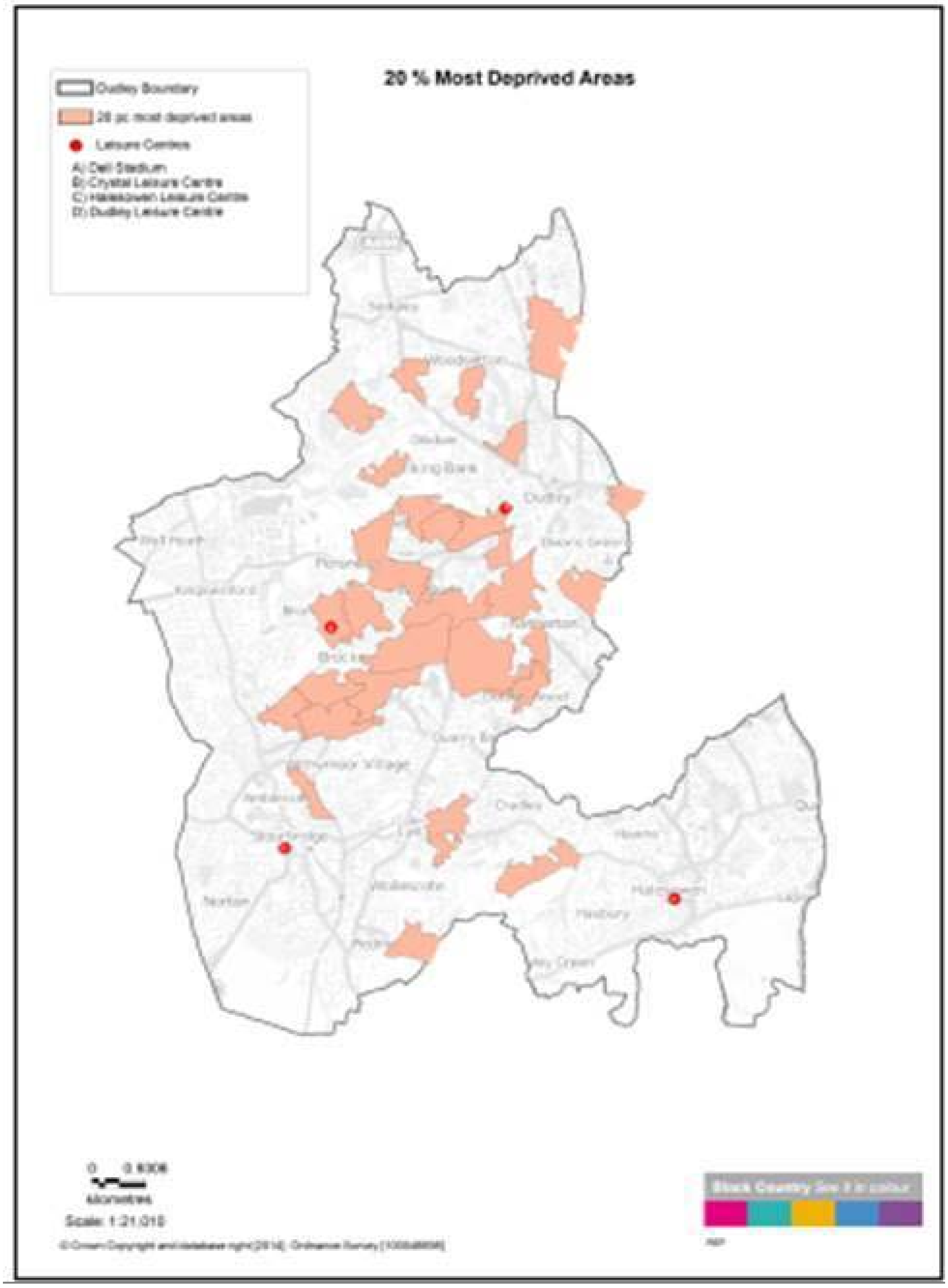
3.61 So again in summary, overall not a high level of CONCENTRATED unmet demand in the top locations. Also it is important to reiterate that it is unmet demand due to access and it is created by the location of demand being outside the walk to or public transport catchment area of a swimming pool.

3.62 The unmet demand due to lack of swimming pool capacity of 96 sq metres is considered under the availability heading.

3.63 Often there is a correlation with low participation and people living in areas of deprivation. Part of the reason can be lack of access to facilities both because of location and the cost of accessing if residents have to use public transport. Map 3.5 overleaf shows the 20% most deprived wards and areas in Dudley. The areas of highest unmet demand and areas of highest deprivation do co-relate in the north of the borough but less so in the centre where there is the largest concentration of deprived areas.

3.64 When considering any changes in locations of pools it will be important to consider locations in relation to this deprivation map. Given 72% of the total unmet demand which is 247 sq metres of water is because of residents living outside the walk to catchment area of a pool and it is residents who do not have access to a car.

Map 3.5: Location of the 20% most deprived areas in Dudley



Summary of findings on ACCESSIBILTY to swimming pools

3.65 Access to swimming pools is assessed based on the catchment area of swimming pools and travel patterns to pools by car, public transport and walking. The Sport England data plots the catchment area of each pool and then determines the demand for each pool within its catchment area.

3.66 The access heading also assesses how much demand for swimming cannot access a swimming pool because (1) it is located outside the catchment area of a pool or (2) the demand exceeds supply and therefore there is no access.

3.67 The summary of findings on access to swimming pools in Dudley are:

- In 2014 some 22% of the Dudley population does not have access to a car. This is quite high (but 2% below the England wide average) and will influence travel patterns to swimming pools;

- Car travel is though the dominant travel mode with 83% of all visits. (car travel catchment area is 20 minutes);

- 8% of all visits to pools is met by residents who walk to pools (based on a 20 minute or 1 mile catchment area), whilst 10% travel by public transport So just short of one in five visits to pools are by a combination of walking or public transport. Presumably by residents who do not have access to a car;

- Based on the location of pools and demand traveling to the nearest pool to where residents live Dudley is retaining 64% of its own demand for pools at pools located in Dudley. Put another way for over six out of ten visits to a swimming pool the nearest pool for Dudley residents is located in the borough;

- It does also mean Dudley is exporting some 36% of its own demand to pools located in neighbouring boroughs (again based on the same assessment that the Dudley demand is traveling to the nearest pool to where residents live). This is quite a high export of demand. In part, it is because of travel to pools by car representing some 83% of all visits. So a high number of visits traveling to pools by car and based on a 20 minute car travel time catchment area this is making a lot of pools accessible to the Dudley demand – hence a high export;

- It is not possible to identify from the data where the Dudley exported demand goes to. However the 2009 Dudley fpm swimming pools report does contain this data and for illustration the findings from that study show;

    - *"The largest export of demand, Dudley residents going elsewhere to swim, is to Wolverhampton, with almost 2,000 visits per week*
    - *Sandwell is the second largest, with 900 visit, unsurprisingly given the length of the common boundary*
    - *The flow to Birmingham is the smallest of all the authorities at only 100 visits per week*

- The amount of Dudley demand which cannot access swimming pools is 10.4% of the total demand. This equates to 344 sq metres of water;

- Most unmet demand at 72% of the total or 247 sq metres of water is from lack of access to pools from residents <u>living outside the walk to or public transport catchment area of existing swimming pools;</u>

- key locations where demand is located outside these walk to and public transport catchments are(1) south of Coseley and west of Tipton along the route of the A459 and (2) east and south of Dudley Leisure Centre; and

- Unmet demand due to lack of swimming pool capacity is 28% of the total and a much lower 96 sq metres of water.

Availability

3.68 Availability of swimming pools is the second most important category of findings after quantity. Availability is on two counts: firstly the hours of community use which are available at each site and; secondly how full the pools are.

3.69 On the first count pools may not be available because they are located in state or independent schools and they do not provide access for community use, which would be for clubs if it happened. Also and as already mentioned, there are 2 commercial pools in Dudley which do are not available for community use because they are only available to members.

3.70 Table 3.7 below sets out the community hours available at all the pool sites across Dudley. The public pool sites do have a variable amount of hours available for community use. All are high and the variation is only 8 hours a week across the three public swimming pool sites. The lowest being 86 hours at Halesowen Leisure Centre and the highest being 94 hours at Dudley Leisure Centre.

3.71 This contrasts with the 29 and 33 hours of community hours available at the two school sites of Crestwood School and Summerhill School respectively. Both are small pools at 120 and 200 sq metres of water respectively. In addition the Crestwood pool opened in 1958 and has not been modernised. So it would only be suitable for either learn to swim programmes.

3.72 The Summerhill School pool at 200 sq metres of water and the most recent pool in Dudley opened in 2003 does offer more scope to increase the availability of pool time for community use. Albeit it would be for club use, assuming there is club demand.

Table 3.7: Total hours of community use at Dudley's pools 2014

Name of facility	Type	AREA	Year built	Year refurbished	PUBLIC/COMMERCIAL	Hours in peak period	Community hours available
DUDLEY							
CRYSTAL LEISURE CENTRE	Leisure Pool	480	1990		P	51.5	**92**
CRYSTAL LEISURE CENTRE	Main/General	250				51.5	**92**
DAVID LLOYD CLUB (DUDLEY)	Main/General	375	2001		C	52	**13**
DUDLEY LEISURE CENTRE	Main/General	250	1978	2004	P	52	**94**
DUDLEY LEISURE CENTRE	Learner/Teaching/Training	50				52	**94**
HALESOWEN LEISURE CENTRE	Main/General	400	1963		P	48.5	**86**
HALESOWEN LEISURE CENTRE	Main/General	135				48.5	**86**
SUMMERHILL SCHOOL	Main/General	200	2003		P	33	**33**
THE CRESTWOOD SCHOOL	Main/General	120	1958		P	29	**29**
VELOCITY HEALTH & FITNESS (BIRMINGHAM DUDLEY)	Main/General	250	2000		C	52	**18**

3.73 Lack of available hours for community use of pools and the need to increase availability is only an issue if the estimate under the second heading of availability – namely "how full the pools are", shows that pools are very full and there is a need to increase pool capacity available of community use.

3.74 It is important therefore to determine how full the pools are. Sport England sets a comfort level at which it considers a pool is comfortably full and this is 70% of the pool's total capacity at peak times. The basis being above this level the pool itself becomes too full and is crowded. Also the circulation and changing areas are also too full and when all combined this creates an uncomfortable experience for customers.

3.75 The findings on the estimated used capacity of all the pools in Dudley are set out in Table 3.8 below.

Table 3.8: Percentage of used and unused capacity for swimming pools in Dudley Borough 2014

Name of facility	Type	Area	Year built	Year refer	% of Capacity used	% of capacity not used	Demand redistributed after initial allocation
DUDLEY					**85%**	**15%**	**788**
CRYSTAL LEISURE CENTRE	Leisure Pool	480	1990		**100%**	**0%**	**-426**
CRYSTAL LEISURE CENTRE	Main/General	250					
DAVID LLOYD CLUB (DUDLEY)	Main/General	375	2001		**53%**	**47%**	**634**
DUDLEY LEISURE CENTRE	Main/General	250	1978	2004	**100%**	**0%**	**-1431**
DUDLEY LEISURE CENTRE	Learner/Teaching/Training	50					
HALESOWEN LEISURE CENTRE	Main/General	400	1963		**100%**	**0%**	**1646**
HALESOWEN LEISURE CENTRE	Main/General	135					
SUMMERHILL SCHOOL	Main/General	200	2003		**100%**	**0%**	**-293**
THE CRESTWOOD SCHOOL	Main/General	120	1958		**100%**	**0%**	**183**
VELOCITY HEALTH & FITNESS (BIRMINGHAM DUDLEY)	Main/General	250	2000		**48%**	**52%**	**475**

3.76 As the table shows the borough wide average is 85% of the pool capacity used at peak times. So across the borough it is 15% above the Sport England pools full comfort level of 70% of capacity used at peak times.

3.77 The borough wide average does however vary at individual pool sites. With all three public leisure centres estimated to be at 100% of pool capacity used at peak times. Whilst for the two school sites and the fewer hours they have available for public use, they too are estimated to be at 100% of pool capacity used at peak times.

3.78 The reason for the borough wide average being below 100% capacity used is because the two commercial pools are estimated to have 48% of pool capacity used at peak times at Velocity, whilst the David Lloyd centre is estimated to be at 53% of pool capacity used. This is based on the membership use at peak times.

3.79 So it is the interaction of the distribution of demand and the differing levels of access and availability at the public and commercial pools for community and membership use which is the big issue.

3.80 The Sport England data also identifies how much demand is available and within the catchment area of the pool but cannot access it because the pool is full and there is no alternative pool where the demand can be absorbed. This is the final column of Table 3.9 and the column titled "demand redistributed after initial allocation".

3.81 The minus sign for a pool entry identifies the amount of demand in visits that would like to use the pool but cannot because it is full. In effect these are the pools where this is the unmet demand because of lack of pool capacity which totals 96 sq metres of water and so it is not high.

3.82 The pools "turning away" the highest amount of visits are in order: Dudley Leisure Centre with 1,431 visits; Crystal Leisure Centre with 426 visits; and Summerhill School with 293 visits.

3.83 The findings on the used capacity for all the other authorities in the study area are set out below in Table 3.9. This shows that excepting Bromsgrove all of the local authorities have a used capacity above the Sport England pools full level of 70% of pool capacity used. Dudley is the lowest with Walsall, South Staffordshire and Birmingham having a similar level at 86.1%, 86.6% and 89.8% of pool capacity used at peak times respectively. Whilst Wolverhampton is at 96.2% and Sandwell has a borough wide average of 100% of the pool capacity being used. In short, across the whole area the estimate is that swimming pools are exceptionally busy.

Table 3.9: Used capacity of swimming pools in Dudley and neighbouring local authorities in 2014

Used Capacity	Dudley	Birmingham	Bromsgrove	Sandwell	South Staffordshire	Walsall	Wolverhampton
Total number of visits used of current capacity	15394	57794	5647	9627	5606	26507	16966
% of overall capacity of pools used	85.2	89.8	69.9	100	86.6	86.1	96.2
% of visits made to pools by walkers	8.5	18.4	8.4	17.9	8.3	13.5	11.1
% of visits made to pools by road	91.5	81.6	91.6	82.1	91.7	86.5	88.9

Summary of findings on AVAILABILTY of swimming pools

3.84 Availability of swimming pools is the second most important category of findings after quantity. Availability is defined on two counts: (1) how full the pools are and (2) the hours of community use which are available at each site.

3.85 In summary the key findings on swimming pool availability are:

- across the borough the estimated used capacity of pools (how full the pools are) is 85% and this is 15% above the Sport England "pools full comfort level" of 70% of capacity used at peak times;

- the 3 public leisure centre pools and the 2 school pools are very full at an estimated 100% of their capacity used and there is no availability at these pools to increase pool time for community use at peak times;

- there is considerable estimated unused capacity at peak times at the two commercial pool Velocity at 48% of pool capacity used and the David Lloyd Centre at 53% of pool capacity used, However the pools are only available to the pools membership and cannot be made available to absorb some of the very high community and club demand at the public pools – it is not a management alternative solution;

- in terms of the swimming pools which are most full and cannot absorb all the demand in their catchment area, these are in order of priority: Dudley Leisure Centre (1,431 visits which cannot be met); Crystal Leisure Centre (426 visits); and Summerhill School (293 visits);

- these 3 sites add up to the 96 sq metres of water which is unmet demand and cannot access pools because they are too full (reported under the access heading);

- there are no alternative EXISTING pools where it is realistic to re-distribute demand from the public leisure centre pools and reduce their used capacity to create some spare headroom. The only alternative provision with spare capacity is the two commercial pools and access to these pools is based on membership not for community use;

- overall there is not sufficient unmet demand ON ITS OWN to warrant consideration of additional swimming pool provision due to lack of swimming pool capacity because it is only 96 sq metres of water;

- however COMBINED WITH the distribution of demand across the public pool sites with all three public leisure centres estimated to be at 100% of their capacity being used at peak times means there is no spare headroom of available pool time for community use at peak times;

- so COMBINED there are supply/demand (quantity), quality, access and availability findings that all direct towards increasing the quantity and quality of swimming pool provision in Dudley; and

- combining (1) the unmet demand finding on lack of pool capacity with the finding (2) that the three pubic leisure centre pools are full and there is (3) a need to re-distribute demand from these pools to create some spare headroom then the collective assessment is that (4) there is a need for additional swimming pool provision in the Borough to address and resolve these findings.

Consultation

3.86 The Amateur Swimming Association swimming facilities team has received and reviewed the naa assessment report based on the ANOG methodology. Their views are:

'The data you have forwarded corresponds with our own data sets and the process is made very easy for us in that we agree with your assessment. Our records shows the same number of pools and sites. As you set out the 3 local authority pools sites all managed in-

house with an age - oldest 51 years and newest 25 years. Clearly there is a replacement issue here and a replacement strategy needs to be considered.

Swimming clubs operate out of all the local authority facilities and also hire some of the educational facilities. All of the local authority pools and educational pools contribute to the Sport England and ASA objective of increased participation across the swimming pathway and most of these facilities are linked to the ASA's swimming framework for both juniors and adults.

With a population of circa 300,000 + there is obviously a shortfall of aquatic provision and this has been accepted for many years, well before the Black Country Strategy was conceived. The reporting of swimmers being exported to surrounding district facilities is well attested.'

3.87 So in summary the ASA key points are:

'the key priority is for Dudley to agree a facility replacement strategy that up-dates its facilities over the next 10-15 years and upgrade at least one of those facilities to an 8-lane competition pool, or potentially a 50m pool but this would need to be viewed in the wider regional context alongside the plans of Sandwell and others. All pools to be part of wider sport complexes to make them sustainable (fitness suite/dance studio) with modern energy efficient design and fabric to reduce cost of operation. The ASA swimming clubs and the community at large use all of the swimming pools in the area in varying degrees. We agree with your assessment swimming pool quality is now poor, the quantity is under-providing for demand but current locations are good. The need for a diving facility has been considered by the ASA and they are supportive of such provision as none exists in the West Midlands region. However Dudley is not a priority area for diving facilities for the ASA. They consider a regional diving facility should be more centrally located but there are no active projects at present.'

Summary of all findings for swimming pools and way forward

3.88 The initial hard evidence finding and collective assessment is that – demand exceeds supply, pools are old and full, there is a need for additional swimming pool provision in the Borough to address and resolve these findings.

Quantity

In 2014 demand for swimming in Dudley exceeds supply by 1, 242 sq metres of water. This is based on an assumption that ALL the demand for swimming in Dudley goes to the swimming pools in Dudley. (Note: for context a 25m x 4 lane pool is 212 sq metres of water).

Dudley has 7 swimming pool sites. There are 3 pubic leisure centre swimming pools providing the full range of swimming activities. There are 2 small school swimming pools and there are 2 commercial swimming pool sites.

Halesowen and Dudley have main pools and learner pools. Crystals has a leisure pool and a 25m pool. Unusually for the commercial sector, the David Lloyd Centre is a large pool of 350 sq metres of water, this is 50 sq metres of water bigger than the Dudley Leisure Centre.

Based on a benchmark (standard) of waterspace per 1,000 population (2014 figures) Dudley has 7.1 sq metres of water. This is the second lowest in the Black Country, with

Sandwell having the lowest at 5.1 sq metres of water and Walsall has the highest at 14.2 sq metres of water. Wolverhampton has 10.4 sq metres of water per 1,000 population.

Quality

Dudley has an old stock of pools. The average age across all the 7 sites and from public and commercial sector providers is 27 years.

The average age of the 3 public leisure centres is 37 years. Crystal Leisure Centre is the youngest pool and it opened in 1990. Dudley Leisure Centre had an extensive modernisation in 2004.

The 2 school pools are the oldest and the youngest pools. Crestwood school opened in 1958 and the youngest pool Summerhill School opened in 2003.

Crystal Leisure Centre and Halesowen Leisure Centre are very large sites providing 2 pools and pool sizes which can cater for the full range of swimming activities. Dudley Leisure Centre is smaller site but does have a reaching/learner pool as well.

Quality of pools in terms of their age and condition can be a barrier to participation. Dudley's rate of swimming participation has declined over the 2006 – 2014 period and age and quality of pools could be a factor.

Significant potential to improve performance at the centres. Given the age of the facilities and some of the condition issues more radical solutions may be required to improve the quality and drive participation.

Access

Access to swimming pools is assessed based on the catchment area of swimming pools and travel patterns to pools by car, public transport and walking. The Sport England data plots the catchment area of each pool and then determines the demand for each pool within its catchment area.

This means the assessment works ACROSS local authority boundaries. Based on the location and catchment area of the Dudley pools, over six out of ten visits (64%) to a Dudley pool it is by a Dudley resident. This is based on the Dudley demand traveling to the nearest pool to where residents live. It also means Dudley is exporting some 35% of its own demand to pools located in neighbouring boroughs.

This is quite a high export of demand. In part, it is because of travel to pools by car represents some 83% of all visits and creates high access to a large number of pools.

Some 8% of all visits are by walking and 10% travel by public transport. So just short of one in five visits to pools are by a combination of walking or public transport. Presumably by residents who do not have access to a car.

It is not possible to identify from the data where the Dudley exported demand goes to. However the 2009 Dudley fpm swimming pools report does contain this data and for illustration the findings from that study show:

- *"The largest export of demand, Dudley residents going elsewhere to swim, is to Wolverhampton, with almost 2,000 visits per week*
- *Sandwell is the second largest, with 900 visit, unsurprisingly given the length of the*

common boundary.

- *The flow to Birmingham is the smallest of all the authorities at only 100 visits per week"*

Unmet demand

Unmet demand is also a measure of accessibility because it measures how much demand cannot access a pool because (1) the pool is too full, or (2) demand is located outside the catchment area of a swimming pool and cannot access a pool therefore.

The total unmet demand is 10.4% of the total demand for swimming by Dudley residents. This equates to 344 sq metres of water. Most unmet demand at 72% of the total or 247 sq metres of water is from lack of access to pools from residents living outside the walk to or public transport catchment area of existing swimming pools. Of that unmet demand arising from poor access, some 82% is made up of residents who have no access to a car, i.e. would have to walk or get a bus to a pool.

The key locations for increasing access to pools based on demand located outside the walk to catchment area of a pool are:

- south of Coseley and west of Tipton along the route of the A459. The total value of unmet demand in this area equates to 20 sq metres of water.

- east and south of Dudley Leisure Centre where there is total unmet demand of 25 sq metres of water.

The unmet demand due to lack of swimming pool capacity is only 96 sq metres is considered under the availability heading.

Availability

Availability of swimming pools is the second most important category of findings after quantity. Availability is on two counts: (1) the hours of community use which are available at each site and; (2) how full the pools are.

On the first count pools may not be available because they are located in state or independent schools and they do not provide access for community use, most likely clubs. The data suggests that Summerhill School has 12 hours of community use a week and Crestwood 6 hours. The scope to increase these hours is very limited as the pool size is 180 sq metres and 120 sq metres respectively at each school site. The pools are effectively learn to swim pools and not suitable for wider community use.

On the second count and across the borough the estimated used capacity of pools (how full the pools are) is 85% and this is 15% above the Sport England "pools full comfort level" of 70% of capacity used at peak times.

The 3 public leisure centre pools are very full at an estimated 100% of their capacity used and there is no availability at these pools to increase pool time for community use at peak times.

There is considerable estimated unused capacity at peak times at the two commercial pool Velocity at 48% of pool capacity used and the David Lloyd Centre at 53% of pool capacity used, However the pools are only available to the pools membership and cannot be made available to absorb some of the very high community and club demand at the public pools – it is not a management alternative solution

In terms of the swimming pools which are most full and cannot absorb all the demand in their catchment area, these are in order of priority: Dudley Leisure Centre (1,431 visits which cannot be met); Crystal Leisure Centre (426 visits); whilst Halesowen is estimated to meet the demand is not re-distributing demand.

These sites add up to the 96 sq metres of water which is unmet demand and cannot access pools because they are too full (reported under the access heading).

There are no alternative EXISTING pools where it is realistic to re-distribute demand from the public leisure centre pools and reduce their used capacity to create some spare headroom. The only alternative provision with spare capacity is the two commercial pools and access to these pools is based on membership not for community use.

ASA comments

The ASA has received and reviewed the naa evidence base report and assessment. The ASA agree/supports the findings and issues that emerge. They consider the authority does need a swimming pool replacement strategy, to cover the next 10 15 years, given the age of the public pool stock.

Furthermore, the ASA consider any new/replacement pool must provide for the full range of swimming activities and be an 8 lane pool (no width stated) or potentially a 50m pool but this would need to be viewed in the wider regional context alongside the plans of Sandwell and others.

The need for a diving facility has been considered by the ASA and they are supportive of such provision as none exists in the West Midlands region. However Dudley is not a priority area for diving facilities for the ASA. They consider a regional diving facility should be more centrally located but there are no active projects at present.

Summary of key findings and way forward

The initial hard evidence finding and collective assessment is that - demand exceeds supply, pools are old and full, there is a need for additional swimming pool provision in the Borough to address and resolve these findings.

Across Dudley demand for swimming exceeds supply. The average age of the three pubic leisure centres is 27 years and so quality and condition of the pool stock is a big issue. Access to pools based on their location and travel by car, public transport and waking is good overall good. So location and access is not an issue. There is some demand located outside the walking catchment area of a pool.

Unmet demand for swimming is only 96 sq metres of water (a 25m x 4 lane pool is 212 sq metres of water)

Overall there is not sufficient unmet demand <u>ON ITS OWN</u> to warrant consideration of additional swimming pool provision due to lack of swimming pool capacity as it is only 96 sq metres of water.

However COMBINED WITH:

- demand for swimming exceeding supply;
- the distribution of demand across the public pool sites with all three public leisure centres estimated to be at 100% of their capacity being used at peak times means there is no spare headroom of available pool time for community use at peak times. Means in total that:
  - Supply/demand (quantity), quality and availability findings all direct towards increasing the quantity and quality of swimming pool provision in Dudley.

This is based on:

- the unmet demand finding on lack of pool capacity combined with the finding;
- the three pubic leisure centre pools are full and there is;
- a need to re-distribute demand from two of these pool sites to create some spare headroom then the collective assessment is that; and
- there is a need for additional swimming pool provision in the Borough to address and resolve these findings.

Options could be:

- development of new additional provision in areas of greatest growth e.g. Brierley Hill
- re-provision of an existing swimming pool at the same site as the location of pools and access to them by each travel mode is good, so picking a new site to improve travel access is not a consideration;
- in terms of which of the three public leisure centre sites are in most demand it is Dudley Leisure Centre, where an estimated 1,400 visits per week would like to be accommodated at the site but there is no availability; and
- the above would have to be viewed in the context of wider regional developments and in discussion with the ASA and neighbouring authorities.

Introduction

4.1 The reporting of findings for sports halls follows the same sequence as for swimming pools.

4.2 Also as with swimming pools the provision in boroughs such as Sandwell and Walsall and in Birmingham City has changed significantly since the fpm assessment in 2009. Consequently it is important to develop a new and up to date 2014 -15 evidence base for sports halls The data used in this assessment is the same fpm data headings as was used in the 2009 fpm report, just it is 2014 and not 2009 data.

Quantity

Table 4.1: Sports halls supply Dudley and neighbouring local authorities 2014

Total Supply	Dudley	Birmingham	Bromsgrove	Sandwell	South Staffordshire	Walsall	Wolverhampton
Number of halls	26	66	16	33	6	29	24
Number of hall sites	18	48	9	22	5	19	17
Supply of total hall space in courts	102.6	265.2	60.7	120.6	22.5	110.3	93.4
Supply of publicly available hall space in courts (scaled with hrs avail in pp)	79.49	200.12	37.06	86.4	20.09	81.36	71.04
Supply of total hall space in visits	16097	40525	7504	17497	4069	16475	14387
Courts per 10,000 pop'n	3.24	2.4	6.37	3.8	2.06	4.04	3.69

4.3 Dudley has 26 sports halls on 18 sites. Excluding Birmingham, only Walsall and Sandwell have more sports halls with 29 and 33 respectively. Wolverhampton has 24 sports halls and South Staffordshire has the least number with 6 sports halls.

4.4 The total number of badminton courts across the 26 sports hall venues in Dudley is 102. However when this is assessed based on the number of sports halls available for community use in the weekly peak period of weekday evenings and weekend days this reduces to 79 badminton courts. So there are 23 badminton courts or 22% of the total supply which is not available for public or club use in the weekly peak period.

4.5 It is most likely the schools/colleges are restricting the amount of time available for community use outside of school time. The details of all the sports hall venues in Dudley are set out overleaf in Table 4.2.

4.6 The breakdown of provision is 12 sports hall sites on school or colleges sites. There are 6 sites which are either local authority owned and managed or at voluntary/club provision. There are no commercial sports hall sites in Dudley.

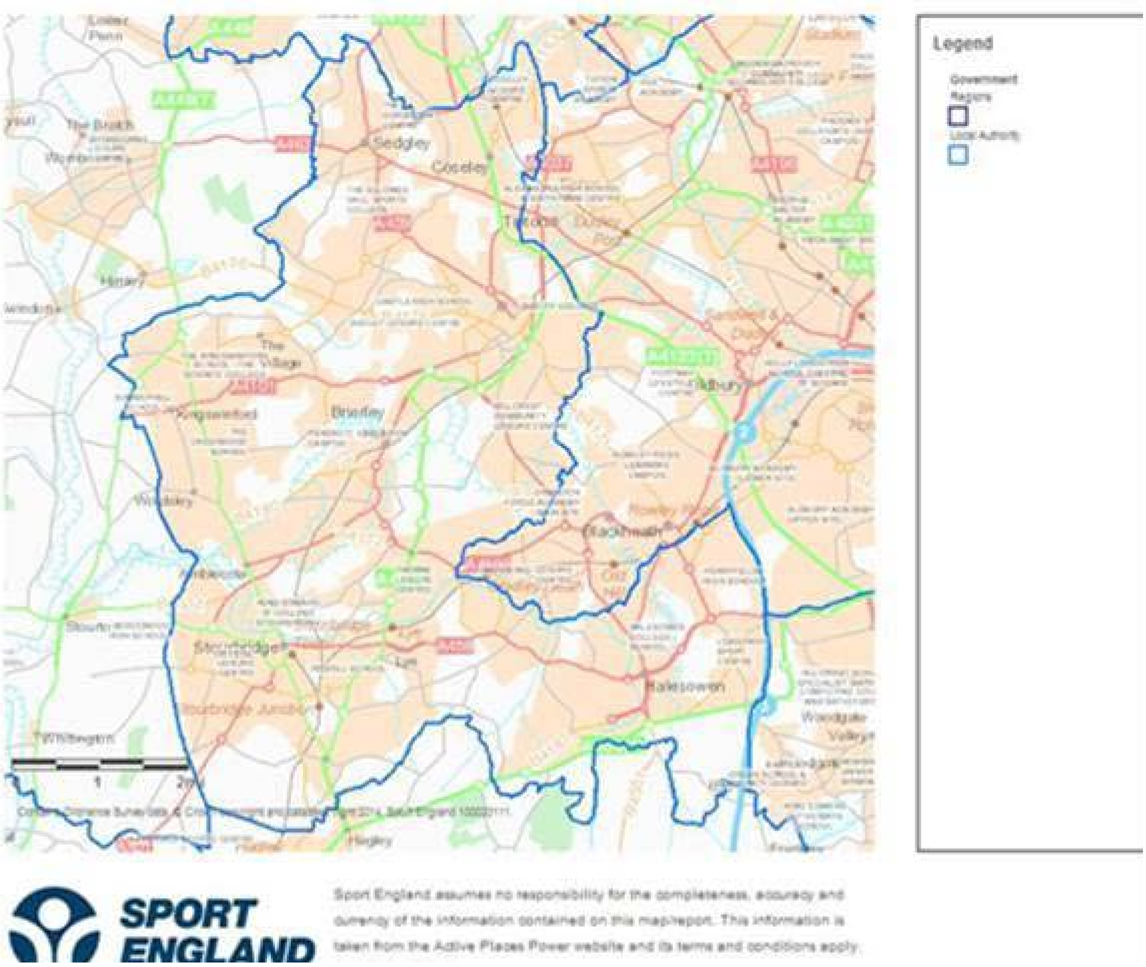
4.7 Based on a comparative measure of badminton courts per 10,000 population, Dudley's provision is mid-range across the authorities at 3.2 courts per 10,000 population. Bromsgove has the highest provision at 6.3 courts and South Staffordshire the lowest at 2 courts per 10,000 population.

Table 4.2: List of all sports halls in Dudley Borough 2014

Name of facility		FPM Courts	Year built	Year refurbished
DUDLEY				
CASTLE HIGH SCHOOL		4	2003	
CASTLE HIGH SCHOOL				
COSELEY LEISURE CENTRE		4	1980	2009
CRYSTAL LEISURE CENTRE		8	1990	2009
DUDLEY COLLEGE		6	2012	
DUDLEY LEISURE CENTRE		4	1978	
DUDLEY LEISURE CENTRE		4		
HALESOWEN COLLEGE SCHOOL		4	2003	
HILLCREST COMMUNITY LEISURE CENTRE		4	1994	
KING EDWARD VI COLLEGE STOURBRIDGE		4	1997	
LEASOWES SPORT CENTRE		6	1974	1994
PENSNETT EDUCATION CAMPUS		4	2006	
PENSNETT EDUCATION CAMPUS				
PENSNETT EDUCATION CAMPUS				
REDHILL SCHOOL		4	1981	
REDHILL SCHOOL				
RIDGEWOOD HIGH SCHOOL		4	1952	2005
SUMMERHILL SCHOOL		3	2003	
THE CRESTWOOD SCHOOL		4	2004	
THE CRESTWOOD SCHOOL				
THE DORMSTON CENTRE		3	2000	2004
THE ELLOWES HALL SPORTS COLLEGE		8	2011	
THE ELLOWES HALL SPORTS COLLEGE				
THE KINGSWINFORD SCHOOL - THE SCIENCE COLLEGE		4	2004	
THORNS LEISURE CENTRE		8	1983	
THORNS LEISURE CENTRE				

4.8 The location of the Dudley sports halls is set out in Map 4.1 overleaf. (Note: it is acknowledged the map does not clearly identify the locations and work to improve the map quality is underway).

Map 4.2: Location of sports halls in Dudley 2014



Supply and demand balance

4.9 The overall supply and demand balance findings for sports halls is about quantity of provision and whether there is a surplus of deficit in sports halls quantity. Supply and demand balance is based on the assumption that all the demand for sports halls in Dudley Borough is met at all the Dudley sports hall venues. So it does not take account of the location, catchment area, type of sports hall and whether residents are choosing to go to venues outside the borough based on the venues in neighbouring authorities being more modern, or, offering a different programme of activity that meets their requirements.

4.10 The reason for presenting this closed assessment of all the Dudley demand for sports halls going to Dudley's venues is because some local authorities like to see how their demand matches their own supply. Supply and demand balance presents this assessment.

4.11 Also a closed assessment can be compared subsequently with how demand is re-distributed when it is based on the location and catchment area of venues and the Dudley demand being distributed to the nearest sports hall to where residents live. In short does Dudley import more demand than it exports or vice versa and by how much? These findings are set out under the access and availability headings.

Table 4.3: Supply & demand balance for sports halls in Dudley and neighbouring authorities 2014

Supply/Demand Balance	Dudley	Birmingham	Bromsgrove	Sandwell	South Staffordshire	Walsall	Wolverhampton
Supply - Hall provision (courts) scaled to take account of hours available for community use	79.49	200.12	37.06	86.4	20.09	81.36	71.04
Demand - Hall provision (courts) taking into account a 'comfort' factor	86.93	326.44	24.68	91.25	28.41	76.36	72.03
Supply / Demand balance	-7.44	-126.32	12.38	-4.85	-8.32	5	-0.99

4.12 Dudley's resident population is estimated to generate a demand for a minimum of 87 (rounded) badminton courts. This compares to a current available supply of 79 badminton courts (rounded) which are available in the weekly peak period of weekday evenings and weekend days for public and club use.

4.13 So overall for Dudley there is a negative supply/demand balance of – 7 badminton courts in 2014. This is quite a low negative balance.

4.14 There is a negative supply and demand balance in Sandwell of 5 badminton courts and in South Staffordshire of 8 badminton courts. In Birmingham the negative balance is a very high 126 badminton courts and so a lot of the Birmingham demand will be looking to find venues outside of the city.

4.15 There is a positive balance of 5 badminton courts in Walsall and 12 courts in Bromsgrove. Whilst Wolverhampton is almost in balance with a deficit of just one badminton court.

Participation

4.16 Participation in sports halls is made up of a combination of participation in individual hall sports such as badminton, basketball and five a side football as well as fitness and exercise classes.

4.17 The Sport England Active People survey does measure participation in each of these sports and some of the activities. However participation is so low that the Active People survey sample size cannot generate a reliable participation rate for each sport/activity at the local authority level.

4.18 However there is the once a week measure of participation for a combination of swimming and sports halls and this is set out in Chart 4.1 overleaf. There is not separate sports hall findings.

4.19 Working on the basis that swimming participation is 8.7% of the Dudley adult population in 2006 and 7% swimming once a week in 2014 (chart in the swimming report) then the participation in hall sports is the balance of the participation in Chart 4.1 overleaf. This means that in 2006 participation in hall sports is 11.6% of the Dudley Adults participating at least once a week. This is virtually unchanged in October 2013 at 11.7% but does fluctuate in the intervening years.

4.20 Similarly the rate of participation across the Black Country has hardly changed from the Dudley rate but has been both higher and lower in the intervening years.

Chart 4.1: Rate of adult once a week participation in swimming and hall sports in Dudley and the Black Country 2006 - 2014

4.21 In terms of participation across the Black Country for the COMBINED swimming and hall sports this shows that Dudley (shaded mid blue in the map below)along with Walsall does have the highest rate of participation at between 22.6% - 25.2% of the adult population doing these activities at least once a week. Sandwell has the lowest rate of participation (shaded white) and Wolverhampton is between the two.

Map 4.3: Percentage of the Black Country population who either swim or do hall sports at least once a week

4.22 There is not a market segmentation profile for the collective hall sports.

Summary assessment of quantity of sports hall provision

4.23 The summary assessment of findings on quantity of sports hall provision are that:

- demand for sports halls exceeds supply by 7 badminton courts in 2014. The total supply in badminton courts is 79 badminton courts at 18 sites available for public use at peak times. Demand for sports halls from Dudley residents equates to 87 badminton courts at peak times;

- Dudley has 26 sports halls on 18 sites. Walsall and Sandwell have more sports halls with 29 and 33 respectively. Wolverhampton has 24 sports halls and South Staffordshire has the least number with 6 sports halls;

- of the 18 sports hall sites some 11 are on secondary school or college sites so the education sector is the main provider;

- the Dudley Council public leisure centres are 5 sites, the largest being Thorns Leisure Centre with 8 badminton courts. Crystal Leisure Centre has 7 badminton courts and the other venues have 4 – 5 courts. So large scale provision at the public leisure centres and which can provide for all indoor hall sports at community level;

- based on a comparative measure of badminton courts per 10,000 population, Dudley's provision is low range in comparison to the rest of the Black Country authorities. Dudley has 3.2 courts per 10,000 population. The provision in Sandwell Walsall and Wolverhampton per 10,000 population is 3.8 courts, 4 courts and 3.6 courts respectively. Bromsgove has the highest provision at 6.3 courts and South Staffordshire the lowest at 2 courts per 10,000 population; and

- in 2006 participation in hall sports is 11.6% of the Dudley adults participating at least once a week. This is virtually unchanged in October 2013 at 11.7% but does fluctuate in the intervening years.

Quality

4.24 Quality of sports halls is assessed by Sport England as the age of the venues and the dates of any major modernisation. It is accepted that this is one only one measure of quality.

4.25 Set out overleaf is Table 4.4 which is a summary of the age of each sports hall site by decade with the decade of any modernisation.

Table 4.4: Age and modernisation of sports halls by decade in Dudley 2014

Name of facility		FPM no of courts	Year built	Year refurbished
DUDLEY				
CASTLE HIGH SCHOOL		4	2003	
CASTLE HIGH SCHOOL				
COSELEY LEISURE CENTRE		4	1980	2009
CRYSTAL LEISURE CENTRE		8	1990	2009
DUDLEY COLLEGE		6	2012	
DUDLEY LEISURE CENTRE		4	1978	
DUDLEY LEISURE CENTRE		4		
HALESOWEN COLLEGE SCHOOL		4	2003	
HILLCREST COMMUNITY LEISURE CENTRE		4	1994	
KING EDWARD VI COLLEGE STOURBRIDGE		4	1997	
LEASOWES SPORT CENTRE		6	1974	1994
PENSNETT EDUCATION CAMPUS		4	2006	
PENSNETT EDUCATION CAMPUS				
PENSNETT EDUCATION CAMPUS				
REDHILL SCHOOL		4	1981	
REDHILL SCHOOL				
RIDGEWOOD HIGH SCHOOL		4	1952	2005
SUMMERHILL SCHOOL		3	2003	
THE CRESTWOOD SCHOOL		4	2004	
THE CRESTWOOD SCHOOL				
THE DORMSTON CENTRE		3	2000	2004
THE ELLOWES HALL SPORTS COLLEGE		8	2011	
THE ELLOWES HALL SPORTS COLLEGE				
THE KINGSWINFORD SCHOOL - THE SCIENCE COLLEGE	4	2004		
THORNS LEISURE CENTRE		8	1983	
THORNS LEISURE CENTRE				

4.26 Of the 6 public leisure centre sites the oldest is Leasowes Sports Centre opened in 1974 and the most recent is the Dormston Centre opened in 2000. The average age of the 6 public sports hall sites is 28 years.

4.27 In terms of modernisation four of the six public leisure centre site have been modernised, the exceptions being Dudley Leisure Centre (opened in 1978) and Hillcrest Community Leisure Centre (opened in 1994).

4.28 Of the 12 school and college sports hall sites they are much more recent provision. The oldest is the Ridgewood High School opened in 1952 and was modernised in 2005. However five of the education venues were opened in the 2000 decade and the most recent were the 8 badminton court size sports hall at Ellowes High School, opened in 2011 and Dudley College (6 courts) opened in 2012.

4.29 The scale of the sports hall provision is very good with 16 of the 18 sites being at least 4 badminton court size. So 16 venues can provide for the full range of indoor halls sports at the community level.

4.30 Some 5 venues have main halls bigger than 4 courts, with the largest venues being Thorns Leisure Centre and Ellowes Hall Sports College both having double halls and 8 badminton courts in total. So five venues which can provide for multi-use activity at one time and offer greater flexibility and capacity for a range of activities.

Summary assessment of QUALITY of sports hall provision

4.31 The summary assessment of quality of sports hall provision based on a quality proxy of age, modernisation and size to provide for a range of activities are:

- Dudley has an old public sector stock of sports halls with the average of the 6 venues being 27 years. Four of the venues have been modernised and the most recent was at Crystal Leisure Centre and Coseley Leisure Centre in 2009

- The education sports hall stock is much more recent with 5 of the 12 venues opened in the 2000 decade and the Dudley College (6 badminton courts) and Ellowes Hall Sports College (8 badminton courts) opening in 2012. The average age of the education stock of sports halls is 9 years

- There are no commercial sports halls in Dudley

- The scale of the sports hall provision is very good with 16 of the 18 sites being at least 4 badminton court size. So16 venues can provide for the full range of indoor halls sports at the community level

- Five venues have main halls larger than 4 courts, with the biggest venues being Thorns Leisure Centre and Ellowes Hall Sports College both having double halls and 8 badminton courts in total. So five venues which can provide for multi-use activity at one time and offer greater flexibility and capacity for a range of activities

- Quality of halls in terms of their age and condition can be a barrier to participation. It is possible that clubs are trying to access the more recent education sports halls which may have a sprung timber floor, more run off space on courts and more modern lighting. Plus the quality of the changing accommodation maybe higher than in public leisure centres. All these factors may contribute to a draw away from the public leisure centres – if clubs can access the education venues.

Accessibility

4.32 Access to sports halls is assessed based on the catchment area of venues and travel patterns to sports halls by car, public transport and walking. The Sport England data plots the catchment area of each venue and then determines the demand for each venue within its catchment area.

4.33 This means the assessment works ACROSS local authority boundaries. The assessment sends the demand to the nearest sports hall to where a resident lives (say authority A)and it can calculate if this venue is in the same local authority as where the resident lives (RETAINED DEMAND), or, if the nearest sports hall to where a resident lives is in another authority (EXPORTED DEMAND).

4.34 The assessment also calculates if a resident lives in (say authority B) but the nearest sports hall to where they live is in authority A then it can calculate how much demand is exported from authority B and becomes (IMPORTED DEMAND) in authority A.

4.35 The findings on access to sports halls from the Sport England 2014 assessment are set out in Table 4.5 below.

Table 4.5: Access to sports halls in Dudley and neighbouring authorities 2014

Satisfied Demand	Dudley	Birmingham	Bromsgrove	Sandwell	South Staffordshire	Walsall	Wolverhampton
Total number of visits which are met	13188	45076	3861	13627	4340	11452	10725
% of total demand satisfied	93.7	85.2	96.6	92.2	94.3	92.6	91.9
% of demand satisfied who travelled by car	78.1	74.7	85.8	68.9	89	73.3	69.6
% of demand satisfied who travelled by foot	13.8	13.7	10.9	19.7	6.9	16.7	18.3
% of demand satisfied who travelled by public transport	8.1	11.7	3.3	11.3	4.1	10.1	12.1
Demand Retained	10014	33984	2653	9397	1631	8118	8302
Demand Retained -as a % of Satisfied Demand	75.9	75.4	68.7	69	37.6	70.9	77.4
Demand Exported	3174	11092	1208	4231	2709	3334	2424
Demand Exported -as a % of Satisfied Demand	24.1	24.6	31.3	31	62.4	29.1	22.6

4.36 In 2014 some 22% of the Dudley population does not have access to a car and this quite high percentage is going to influence travel patterns to sports halls. Car travel is the dominate travel mode with 78% of all visits. The car travel catchment area is 20 minutes. Nearly 14% of all visits to sports halls are met by residents who walk to venues (based on a 20 minute or 1 mile catchment area), whilst travel by public transport accounts for just over 8% of all visits.

4.37 So around 22% of all visits to sports halls are by a combination of walking or public transport, over one in five visits to sports halls. Presumably most of this is by residents who do not have access to a car.

4.38 The Dudley travel pattern percentage for car travel is around 10% higher than the other Black Country authorities. Sandwell and Wolverhampton are around 68% off all visits to venues by car and it is 73% in Walsall.

4.39 Dudley is retaining 76% of its own demand for sports halls at venues located in the Borough this is higher than all the other authorities. It means that the location and catchment area of the 18 sports halls sites are very well placed in relation to where the demand for sports halls by Dudley residents is located. So much so that for three out of four visits to a sports hall by a Dudley resident is to a sports hall located in the Borough.

4.40 It does also mean that Dudley is exporting some 25% of its own demand to sports halls located in neighbouring boroughs. Again based on the assessment that the Dudley demand is traveling to the nearest venue to where residents live and based on a 20 minute car travel time catchment area.

4.41 As with the swimming pools assessment it is not possible to identify from the data where the Dudley exported demand goes to. However the 2009 Dudley fpm sports hall report does contain this data but the reporting was not very detailed. For illustration the findings are set out below in italics

"In 2009 some 27% of Dudley residents who want to use a sports hall have to travel outside the Borough to do so. It is difficult for Dudley MBC to be confident that their residents' needs will be catered for outside the Borough. The recent closure / restriction of community use at Hay Bridge School Sports Hall in Bromsgrove, just beyond the Dudley boundary, illustrates the uncertainty of relying on supply elsewhere".

4.42 The Sport England data on unmet demand and access to sports halls is set out below as Table 4.6.

Table 4.6: Unmet demand - demand from Dudley residents for sports halls not being met 2014

Unmet Demand	Dudley	Birmingham	Bromsgrove	Sandwell	South Staffordshire	Walsall	Wolverhampton
Total number of visits in the peak, not currently being met	894	7806	137	1154	263	919	942
Unmet demand as a % of total demand	6.3	14.8	3.4	7.8	5.7	7.4	8.1
Equivalent in Courts - with comfort factor	5.51	48.19	0.85	7.13	1.63	5.68	5.81
% of Unmet Demand due to ;							
Lack of Capacity -	11.1	38.4	7	22.9	1.8	15	7.7
Outside Catchment -	88.9	61.6	93	77.1	98.2	85	92.3

4.43 Unmet demand totals 894 visits or 6.3% of the total demand for sports halls by Dudley residents. This equates to just over 6 badminton courts.

4.44 Unmet demand has two types (1) unmet demand located outside the catchment area of a sports hall. This is most unmet demand at 89% of the total or 5.6 badminton courts is from lack of access to sports halls and arises from residents <u>living outside the walk to or public transport catchment area of existing sports hall venues.</u> Of that unmet demand arising from poor access, some 80% is made up of residents who have no access to a car, i.e. would have to walk or get a bus to a sports hall.

4.45 Unmet demand from the second definition (2) due to lack of sports hall capacity is 11% of the total or just over half of a badminton court.

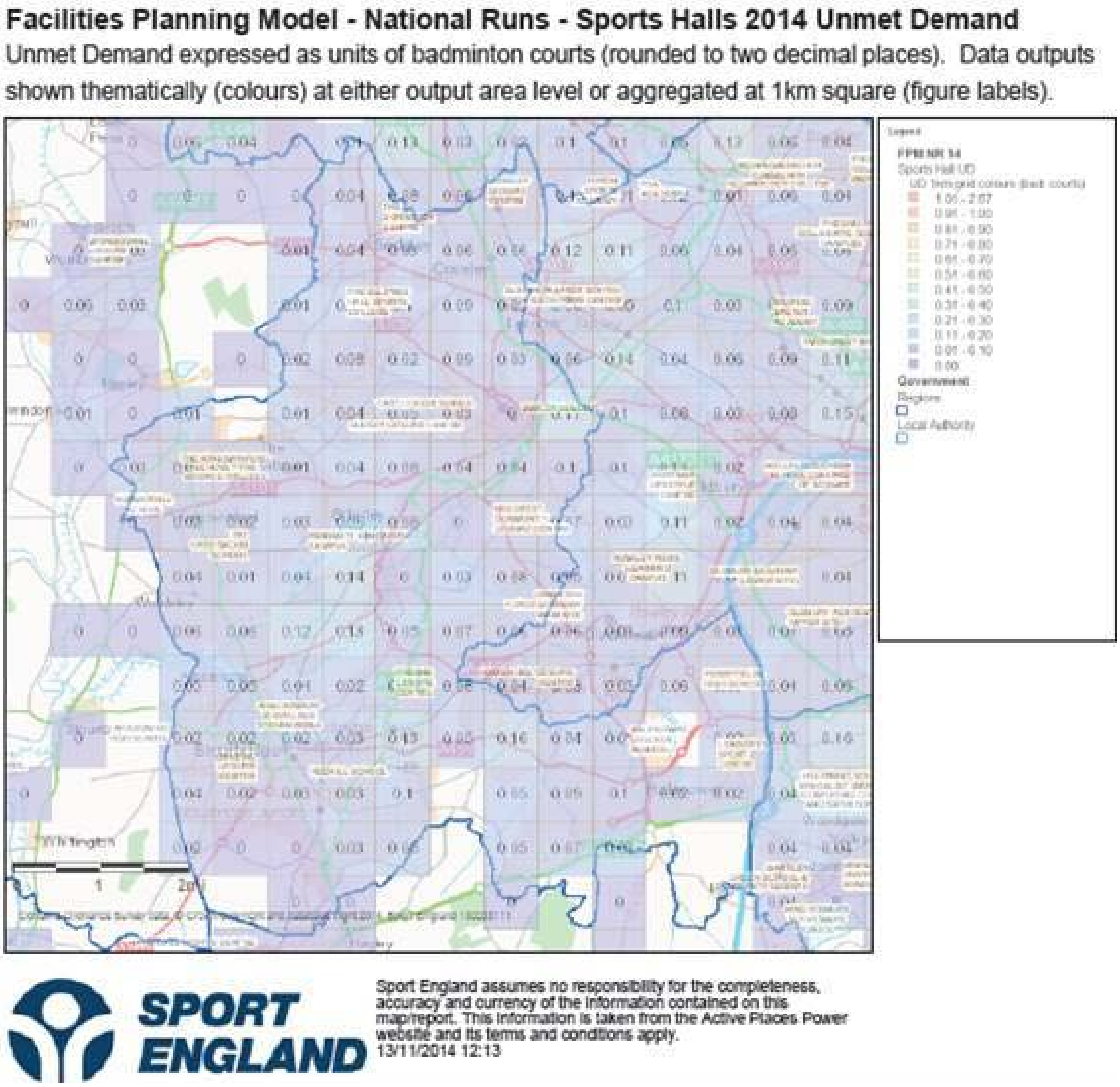
4.46 Map 4.4 overleaf shows the scale and location of unmet demand across Dudley in one kilometre grid squares. The values in each square refer to unmet demand expressed in terms of numbers of badminton courts. (Note: again it is acknowledged the colour coding of the map and titling does not make the findings easy to identify. Discussion is underway with Sport England to see if the map quality can be improved).

4.47 The squares are shaded two shades of blue and the lighter of the two has unmet demand to the value of between 0.11 – 0.20 of one badminton court and so very low values of unmet demand. There are 6 of these squares across Dudley with four of these squares to the north east of King Edwards VI College sports hall in Stourbridge.

4.48 All of the remaining squares are shaded the darker of the blue and these have a value of between 0.01 – 0.10 of one badminton and so very low values.

4.49 So, in summary, overall unmet demand is very low – from either source and totals 6 badminton courts but only half of one badminton court is due to lack of sports hall capacity.

Map 4.4: Unmet demand for sports halls in Dudley expressed as badminton courts 2014



Summary of findings on ACCESSIBILTY to swimming pools

4.50 Access to sports halls is assessed based on the catchment area of sports halls pools and travel patterns to venues pools by car, public transport and walking. The Sport England data plots the catchment area of each site and then determines the demand for each venue within its catchment area.

4.51 The access heading also assesses how much demand for sports halls cannot access a venue because (1) it is located outside the catchment area of a sports hall (2) the demand for the sports halls exceeds the supply and so there is unmet demand.

4.52 The summary of findings on access to sports halls in Dudley are:

- In 2014 some 22% of the Dudley population does not have access to a car. This is quite high (but 2% below the England wide average) and will influence travel patterns to sports halls

- Car travel is though the dominate travel mode with 78% of all visits

- 14% of all visits to sports halls is met by residents who walk to venues (based on a 20 minute or 1 mile catchment area), whilst 8% travel by public transport. So just over one in five visits to sports halls are by a combination of walking or public transport. Presumably by residents who do not have access to a car

- Access to sports halls by Dudley residents based on where residents live and the location and catchment area of sports halls is very good. Dudley is retaining 76% of its own demand for sports halls at venues located in the Borough this is higher than all the other Black Country authorities. This does means the location and catchment area of the 18 sports halls sites are well placed to meet Dudley’s demand. So much so that for three out of four visits to a sports hall by a Dudley resident it is to a sports hall located in the Borough

- It does also mean Dudley is exporting some 25% of its own demand to sports halls located in neighbouring boroughs

- The amount of Dudley demand which cannot access sports halls is very low at a total of 6 badminton courts. Of this total 5.5 badminton courts is unmet demand located outside the catchment area (walking or public transport) of a sports hall

- Only half of one badminton court is unmet demand which cannot access a sports hall is because there is a lack of capacity.

Availability

4.53 Availability of sports halls is the second most important category of findings after quantity. Availability is assessed on two counts: (1) the hours of community use which are available at each site and; (2) how full the sports halls are.

4.54 On the first count sports halls may not be available because they are located in state or possibly independent schools and they do not provide access for community use, which would most likely be for clubs if it happened.

4.55 Table 4.7 below sets out the community hours available at all the sports hall sites as identified in the Sport England database. (Note: this is hard evidence data and it has not been reviewed at the actual school sites. It should therefore be taken as indicative and not definitive).

4.56 The Dudley Council leisure centre sites have a high amount of community use hours as would be expected at 38 hours of peak time use per week and obviously available throughout the daytime as well. . The education sites do vary from 20 hours in the peak period for community use at Castle High School and Halesowen College School to 38 hours at Dudley College. These could however be over estimates.

Table 4.7: Hours of community use at Dudley's sports halls 2014

Name of facility	FPM Courts	Site Year built	Site Year refurbed	Hours in peak period	Community hours available
DUDLEY					
CASTLE HIGH SCHOOL	4	2003		20	**20**
CASTLE HIGH SCHOOL				20	**20**
COSELEY LEISURE CENTRE	4	1980	2009	38	**52**
CRYSTAL LEISURE CENTRE	8	1990	2009	38	**100**
DUDLEY COLLEGE	6	2012		38	**45**
DUDLEY LEISURE CENTRE	4	1978		38	**92**
DUDLEY LEISURE CENTRE	4			38	**92**
HALESOWEN COLLEGE SCHOOL	4	2003		20	**20**
HILLCREST COMMUNITY LEISURE CENTRE	4	1994		25	**25**
KING EDWARD VI COLLEGE STOURBRIDGE	4	1997		33	**44**
LEASOWES SPORT CENTRE	6	1974	1994	28	**31**
PENSNETT EDUCATION CAMPUS	4	2006		36	**41**
PENSNETT EDUCATION CAMPUS				36	**41**
PENSNETT EDUCATION CAMPUS				36	**41**
REDHILL SCHOOL	4	1981		33	**37**
REDHILL SCHOOL				33	**37**
RIDGEWOOD HIGH SCHOOL	4	1952	2005	28	**29**
SUMMERHILL SCHOOL	3	2003		32	**33**
THE CRESTWOOD SCHOOL	4	2004		27	**29**
THE CRESTWOOD SCHOOL				27	**29**
THE DORMSTON CENTRE	3	2000	2004	38	**41**
THE ELLOWES HALL SPORTS COLLEGE	8	2011		29.5	**32**
THE ELLOWES HALL SPORTS COLLEGE				15	**15**
THE KINGSWINFORD SCHOOL - THE SCIENCE COLLEGE	4	2004		31.5	**34**
THORNS LEISURE CENTRE	8	1983		35	**43**
THORNS LEISURE CENTRE				35	**43**

4.57 There would however appear to be scope to increase the hours of use at the education sites. Based on the quantity findings this is not a big requirement as the difference between supply and demand is only 6 badminton courts and Dudley has 80 badminton courts available for community use at peak times. It may be more important to increase the availability of education based sports halls for sports development purposes to create dedicated club or sport specific venues.

4.58 The second heading of availability is "how full are the sports halls"? It is important to determine how full the venues are to see if there are pressure or pinch points at particular venues and if some are fuller than others. If so there maybe the need to consider if intervention is need to re-distribute demand amongst venues to get a more even level of use.

4.59 Sport England sets a comfort level at which it considers a sports hall is comfortably full and this is 80% of the venue's total capacity at peak times. The basis being above this level the sports hall venue of changing, circulation and entrances are too full and possibly the actual sports halls has players waiting to use it. When this happens it creates an uncomfortable level of use for customers and it can detract from participation.

4.60 The findings on the estimated used capacity of all the sports halls in Dudley are set out in Table 4.8 below.

Table 4.8: Percentage of used and unused capacity for sports halls in Dudley 2014

Name of facility		FPM Courts	Year built	Year refurbished	% of Capacity used	% of capacity not used	Demand redistributed after initial allocation
DUDLEY					**84%**	**16%**	**796**
CASTLE HIGH SCHOOL		4	2003		**90%**	**10%**	**173**
CASTLE HIGH SCHOOL							
COSELEY LEISURE CENTRE		4	1980	2009	**100%**	**0%**	**146**
CRYSTAL LEISURE CENTRE		8	1990	2009	**100%**	**0%**	**-264**
DUDLEY COLLEGE		6	2012		**100%**	**0%**	**122**
DUDLEY LEISURE CENTRE		4	1978		**100%**	**0%**	**205**
DUDLEY LEISURE CENTRE		4					
HALESOWEN COLLEGE SCHOOL		4	2003		**100%**	**0%**	**59**
HILLCREST COMMUNITY LEISURE CENTRE		4	1994		**100%**	**0%**	**225**
KING EDWARD VI COLLEGE STOURBRIDGE		4	1997		**60%**	**40%**	**68**
LEASOWES SPORT CENTRE		6	1974	1994	**78%**	**22%**	**161**
PENSNETT EDUCATION CAMPUS		4	2006		**100%**	**0%**	**101**
PENSNETT EDUCATION CAMPUS							
PENSNETT EDUCATION CAMPUS							
REDHILL SCHOOL		4	1981		**89%**	**11%**	**145**
REDHILL SCHOOL							

Name of facility		FPM Courts	Year built	Year refurbished	% of Capacity used	% of capacity not used	Demand redistributed after initial allocation
RIDGEWOOD HIGH SCHOOL		4	1952	2005	**43%**	**57%**	**39**
SUMMERHILL SCHOOL		3	2003		**100%**	**0%**	**26**
THE CRESTWOOD SCHOOL		4	2004		**67%**	**33%**	**90**
THE CRESTWOOD SCHOOL							
THE DORMSTON CENTRE		3	2000	2004	**100%**	**0%**	**240**
THE ELLOWES HALL SPORTS COLLEGE		8	2011		**67%**	**33%**	**187**
THE ELLOWES HALL SPORTS COLLEGE							
THORNS LEISURE CENTRE		8			**68%**	**32%**	**186**

4.61 As the table shows the <u>borough wide average</u> is 84% of the sports hall capacity used at peak times. So across the borough it is 4% above the Sport England halls full comfort level of 80% of capacity used at peak times.

4.62 The borough wide average does however vary at individual pool sites. With all but one of the public leisure centres estimated to be at 100% of hall capacity used at peak times. Whilst for Thorns Leisure Centre it is a lower 68% of capacity used at peak times.

4.63 The reason for the borough wide average being lower is because of fewer hours for club and community use outside of school hours at four of the education sports halls sites. Thereby reducing the borough wide average of used capacity. For example, the table shows the used capacity at the King Edward VI College is 60% of capacity used.

4.64 So it is the interaction of the distribution of demand and the differing levels of access and availability at the public and education sports a hall which is the big issue.

4.65 The Sport England data also identifies how much demand is available and within the catchment area of a sports hall but cannot access it because the venue is full and there are no alternative venues where the demand can be absorbed. This is the final column of Table 4.9 above and the column titled “demand redistributed after initial allocation”.

4.66 The minus sign for an entry identifies the amount of demand in visits that would like to use the sports hall but cannot because it is full. In effect it is the unmet demand due to lack of sports hall capacity that was identified as less than one badminton court under the access heading.

4.67 So not big and the venue which has the capacity issue is Crystal Leisure Centre which cannot absorb 264 visits in the peak period.

Summary of findings on AVAILABILTY of sports halls

4.68 Availability of sports halls is the second most important category of findings after quantity. Availability is defined on two counts: (1) how full the pools are and (2) the hours of community use which are available at each site

4.69 In summary the key findings on sports halls availability are:

- the borough wide average estimated used capacity of sports halls (how full the venues are) is 84% and this is 4% above the Sport England "halls full comfort level" of 80% of capacity used at peak times;

- the public leisure centre sports halls with the exception of Thorns Leisure centre are estimated to be at 100% of capacity used at peak times as are four of the education sports hall sites;

- however there are also four other education sites where there is more limited availability of sports halls for community use. This leads to this differential distribution of demand and some sports halls being fuller than others – notably the public leisure centres; and

- there is one sports hall venue where it is estimated that all the demand cannot be met and this is Crystal Leisure Centre (264 visits). This equates to the half of one badminton court of unmet demand that was reported under the access heading.

4.70 Bringing together the findings across all the assessment headings the overall findings are that demand for sports halls exceeds supply by 7 badminton courts. However virtually all of this unmet demand is due to location and it being outside the walk to and public transport catchment area of a sports hall. There is less than one badminton court of unmet demand due to lack of sports hall capacity. So overall there is NOT sufficient unmet demand <u>ON ITS OWN</u> to warrant consideration of additional sports hall provision due to lack of capacity because it is less than one badminton court.

4.71 The big issue is that the sports halls are estimated to be very full and there is very limited scope to re-distribute demand. Do this so as to ease the pressure on the public leisure centres and some education sports halls sites which have the highest availability for community use, outside of school hours.

4.72 This leads to the most available sports halls being very full and the borough wide average of capacity used is just over the Sport England halls full comfort level of 80%.

4.73 So the intervention that could be required is to try and re-distribute demand from the public centres and increase access and availability at school sports halls. However according to the Sport England data there is limited scope for this intervention because there are only four education sites where there is scope to increase the hours available for community use.

4.74 In short it is a fine balance – there is not enough demand to justify more provision of sport halls but the sports halls are estimated to be very full. Scope to re-distribute demand to ease the pressure on the most heavily used public leisure centres is limited because the data suggests there are limited venues where there is more time to be made available.

4.75 So the initial assessment of the hard evidence data on sports halls is a bit of fuzzy picture. Further work is required on the actual use of the centres and are they as full as the data suggest? If not there may be more scope for intervention to re-distribute demand between venues and this could be as much as for sports development reasons e.g., creating dedicated centres for particular sports or club venues as much as achieving a more balanced distribution of supply and demand.

Comments received from National Governing Bodies of Hall Sports

4.76 Comments have been received from Volleyball England on requirements for volleyball. In summary these are:

- Dudley is a priority area in terms of delivery, Wombourne and Redhill are key clubs in the region.
- facilities for volleyball are predominately at FE Colleges (Dudley, Halesowen, BMET Stourbridge, King Edward VI) and Schools (Redhill, Ridgewood, Hagley).
- Facility provision is good, beach courts would be nice.
- The quality of some facilities ie. Redhill Stourbridge are quite dated and therefore new build facilities should probably be targeted to accommodate the 3 national league teams in the area and further aspiring clubs.
- There is limited capital funding available through Volleyball England.

Summary of all findings for sports halls and way forward

Quantity

Demand for sports halls in Dudley exceeds supply by 8 badminton courts (rounded) in 2014. The total supply in badminton courts is 79 badminton courts at 18 sites available for public use at peak times. Demand for sports halls from Dudley residents equates to 87 badminton courts at peak time.

Of the total unmet demand only 1 court is because of lack of capacity and this appears to be at Crystal Leisure Centre. The remaining unmet demand of is demand located outside the walk to catchment area of a sports hall and this is then classified as unmet demand.

Dudley has 26 sports halls on 18 sites. Of the 18 sports hall sites some 11 are on secondary school or college sites so the education sector is the main provider.

The largest public leisure centre is Thorns Leisure Centre with 8 badminton courts. Crystal Leisure Centre has 7/8 badminton courts and the other venues have 4 – 5 courts. So large scale provision at the public leisure centres and which can provide for all indoor hall sports at community level.

Based on a comparative measure of badminton courts per 10,000 population, Dudley's provision is lowest in comparison to the rest of the Black Country authorities. Dudley has 3.2 courts per 10,000 population. The provision in Sandwell Walsall and Wolverhampton per 10,000 population is 3.8 courts, 4 courts and 3.6 courts respectively. Outside of the Black Country Bromsgrove has the highest provision at 6.3 courts and South Staffordshire the lowest at 2 courts per 10,000 population.

Quality

Dudley has an old public sector stock of sports halls. The average age of the public leisure centre and sports hall stock is 27 years. Four of the venues have been modernised and the most recent was at Crystal Leisure Centre and Coseley Leisure Centre in 2009.

The education sports hall stock is much more recent with 5 of the 11 venues opened in the 2000 decade and the Dudley College (6 badminton courts) and Ellowes Hall Sports College (8 badminton courts) opening in 2012. The average age of the education stock of sports halls is 9 years.

There are no commercial sports halls in Dudley

The scale of the sports hall provision is very good with 16 of the 18 sites being at least 4 badminton court size. So16 venues can provide for the full range of indoor halls sports at the community level.

Five venues have main halls larger than 4 courts, with the biggest venues being Thorns Leisure Centre and Ellowes Hall Sports College both having double halls and 8 badminton courts in total. So five venues which can provide for multi-use activity at one time and offer greater flexibility and capacity for a range of activities.

Quality of sports halls in terms of their age and condition can be a barrier to participation. It is most likely clubs are trying to access the more recent education sports halls which may have a sprung timber floor, more run off space on courts and more modern lighting. Plus the quality of the changing accommodation maybe higher than in public leisure centres. All these factors may contribute to a draw away from the public leisure centres – IF clubs can access the education venues.

Accessibility

Accessibility is a measure of travel patterns to sports halls by car, public transport and walking. It also measures (1) how much demand cannot access sports halls because it is located outside the catchment area of a sports halls and (2) the amount of Dudley demand accesses/is retained in Dudley and how much is exported.

Car travel based on a 20 minute drive time catchment area is the dominate travel mode to sports halls, accounting for 78% of all visits.

14% of all visits to sports halls is met by residents who walk to venues (based on a 20 minute or 1 mile catchment area), whilst 8% travel by public transport. So just over one in five visits to sports halls are by a combination of walking or public transport. Presumably by residents who do not have access to a car.

Access to sports halls by Dudley residents based on where residents live and the location and catchment area of the sports halls is very good. Dudley is retaining 76% of its own demand for sports halls at venues located in the Borough, this is higher than all the other Black Country authorities.

This does means the location and catchment area of the 18 sports halls sites are well placed to meet Dudley's demand. So much so that for three out of four visits to a sports hall by a Dudley resident it is to a sports hall located in the Borough.

It does also mean Dudley is exporting some 25% of its own demand to sports halls located in neighbouring boroughs.

Availability

Availability of sports halls is the second most important category of findings after quantity. Availability is defined on two counts: (1) how full the sports halls are (used capacity) and (2) the hours of community use which are available at each site.

The borough wide average for used capacity of sports halls is 84% and this is 4% above the Sport England "halls full comfort level" of 80% of capacity used at peak times.

The public leisure centre sports halls with the exception of Thorns Leisure Centre are estimated to be at 100% of capacity used at peak times as are four of the education sports hall sites – for the hours they are available for community use. These being Dudley College, Halesowen College School, Pensnett Education Campus and Summerhill School.

However there are also three other education sites where there is more limited availability of sports halls for community use. These being King Edward VI College, Ridgewood High School and Crestwell School. This leads to this differential distribution of demand and some sports halls being fuller than others – notably the public leisure centres.

There is one sports hall venue where it is estimated all the demand cannot be met and this is Crystal Leisure Centre (264 visits). This equates to one badminton court of unmet demand that was reported under the quantity heading.

Comments received from National Governing Bodies of Sport

Comments have been received from Volleyball England on requirements for volleyball. In summary these are:

- Dudley is a priority area in terms of delivery, Wombourne and Redhill are key clubs in the region.
- Facilities for volleyball are predominately at FE Colleges (Dudley, Halesowen, BMET Stourbridge, King Edward VI) and Schools (Redhill, Ridgewood, Hagley).
- Facility provision is good, beach courts would be nice!
- The quality of some facilities i.e. Redhill Stourbridge are quite dated and therefore new build facilities should probably be targeted to accommodate the 3 national league teams in the area and further aspiring clubs.
- There is limited capital funding available through Volleyball England.

Overall summary of findings and way forward

Dudley has an old public sector stock of sports halls. The average age of the public leisure centre sports hall stock is 27 years. The education sports hall stock is much more recent with 5 of the 11 venues opened in the 2000 decade. Quality in the public leisure centres is a big issue.

Overall there is NOT sufficient unmet demand ON ITS OWN to warrant consideration of additional sports hall provision due to lack of capacity because it is one badminton court.

That said - the estimated used capacity of the sports halls is high with 84% of capacity used at peak times and is higher at 4 public and education venues.

So sports halls are very full with the distribution of demand across venues varying - this coupled with the age of the pubic centre sports hall stock are the key findings and issues.

There is a fine balance – there is not enough demand to justify more provision of sport halls but the sports halls are estimated to be very full. Scope to re-distribute demand to ease the pressure on the most heavily used public leisure centres is limited because the data suggests there are limited venues where there is more time to be made available.

Finally there is the impact of population change and potential changes in hall sports participation to consider – which could create more demand.

The way forward is to model some options based on the facilities planning model to determine the impact of population change and its distribution has on the overall supply and demand for sports halls. This may create additional demand which would struggle to be accommodated with the existing provision. It would also provide an evidence base on the future requirements for sports halls based on housing growth – scale and location.

Introduction

5.1 The analysis for the remaining facility types follows the same sequence of reporting as for swimming pools and sports halls and under the same ANOG headings. However the level of data and analysis is not as extensive as for swimming pools and sports halls as there is no fpm available for these facility types.

Indoor Bowling Centres

Quantity

5.2 There are no indoor bowls centres in Dudley and there are none in the Black Country. Within West Midlands Region there are 13 centres with 2 in each of Birmingham and Stratford upon Avon and 1 centre in 9 other authorities. There are a total of 76 rinks at the 13 centres and the largest centres are 8 rinks at Thronfield Indoor Bowls Club in Rugby and Solihull Indoor Bowls Club.

5.3 Most indoor bowls facilities are private sector/club owned and/or managed with membership access to use the centre, although most centres do provide for pay and play as casual use at off peak times as a way of encouraging subsequent membership. This type of ownership and access applies to 6 of the 13 centres. There are 2 centres which are classified as commercial centres and these are the 2 centres already mentioned which have 8 rinks. They operate on a pay and play access.

5.4 Some centres are owned by local authorities, some 38% of the total supply across the West Midlands. Three of these centres are operated by Trusts with one operated directly in house and by the local authority which is the Stirchley Indoor Bowls Centre in Birmingham and the other centre at Shrewsbury Sports Village being commercial management but with pay and play access.

5.5 Club membership levels are not known but from studies elsewhere, mainly in Norfolk which has above national average rates of participation in indoor bowls and looking at 9 centres the membership levels are declining across all types of ownership. Average membership at these centres is between 350 and 400 members.

5.6 Details of the indoor bowling centres across the West Midlands is set out overleaf in Table 5.1.

Table 5.1: Indoor Bowling Centres in the West Midlands 2014

Site Name	Facility Type	Number of rinks	Access Type	Ownership Type	Management Type	Year Built	Year Refurb.	LA Name	County Name
AVON VALLEY INDOOR BOWLS CLUB	Indoor Bowls	6	Sports Club / Community Association	Sports Club	Sport Club	1976	2003	Stratford-on-Avon	Warwickshire
BRIDGE STREET SPORTS CENTRE	Indoor Bowls	6	Pay and Play	Local Authority	Trust	1997	n/a	Herefordshire	
BROMSGROVE & DISTRICT INDOOR BOWLS CLUB	Indoor Bowls	6	Pay and Play	Sports Club	Sport Club	1993	2012	Bromsgrove	Worcestershire
CHASE LEISURE CENTRE	Indoor Bowls	2	Pay and Play	Local Authority	Trust	1991	n/a	Cannock Chase	Staffordshire
COVENTRY SPORTS & LEISURE CENTRE	Indoor Bowls	6	Pay and Play	Local Authority	Trust	1974	2003	Coventry	
ERDINGTON COURT SPORTS CLUB	Indoor Bowls	4	Sports Club / Community Association	Community Organisation	Trust	1976	n/a	Birmingham	
MANOR PARK MALVERN MULTISPORTS COMPLEX	Indoor Bowls	6	Sports Club / Community Association	Other	Trust	1986	2002	Malvern Hills	Worcestershire
RUGBY THORNFIELD INDOOR BOWLS CLUB	Indoor Bowls	8	Pay and Play	Commercial	Commercial Management	1974	2004	Rugby	Warwickshire
SHREWSBURY SPORTS VILLAGE	Indoor Bowls	6	Pay and Play	Local Authority	Commercial Management	2007	n/a	Shropshire	
SOLIHULL INDOOR BOWLS CLUB LTD	Indoor Bowls	8	Pay and Play	Commercial	Trust	1996	n/a	Solihull	
STIRCHLEY INDOOR BOWLS CENTRE	Indoor Bowls	6	Pay and Play	Local Authority	Local Authority (in house)	1985	2006	Birmingham	
TAMWORTH & DISTRICT INDOOR BOWLS CLUB	Indoor Bowls	6	Pay and Play	Sports Club	Sport Club	1990	2005	Tamworth	Staffordshire
WELFORD-ON-AVON INDOOR BOWLS CLUB	Indoor Bowls	6	Sports Club / Community Association	Sports Club	Sport Club	1996	2005	Stratford-on-Avon	Warwickshire

5.7 As there is no provision for indoor bowling centres in Dudley there is no mapping of provision.

Bowls facilities per 1,000 population

5.8 Facilities per 1000 population is a manual calculation of the pro rata provision of indoor bowls in Dudley and the West Midlands authorities which have an indoor centre is set out below in Table 5.2. This shows that Stratford upon Avon which has two centres has the best provision at 0.96 rinks per 1,000 population, followed by Malvern Hills at 0.79 rinks per 1,000 population and Rugby at 0.77 rinks per 1,000 population. Not counting Birmingham because it has a much larger population than the other authorities, the provision is lowest in Coventry at 0.18 rinks per 1,000 population.

Table 5.2: Indoor bowling centres per 1,000 population in West Midlands authorities

Authority	Population 2014	Indoor bowls centres	Rinks	Rinks/1000 population
Dudley		0	0	0
Stratford upon Avon	124164	2	12	0.96
Herefordshire	188299	1	6	0.31
Bromsgrove	95225	1	6	0.63
Cannock Chase	98513	1	2	0.20
Coventry	333088	1	6	0.18
Birmingham	1103398	2	10	0.09
Malvern Hills	75928	1	6	0,79
Rugby	103802	1	8	0.77
Shropshire	311276	1	6	0.19
Solihull	210898	1	8	0.37
Tamworth	78428	1	6	0.76
West Midlands Region		13	76	

Sports Facilities Calculator (SFC)

5.9 The SFC is primarily intended to estimate the demand for facilities in discrete areas - e.g. it is useful in determining the likely demand for sports facilities from the residents of new housing growth. With some provisos, it can be used to give a broad estimate of the demand over a local authority area, though it takes no account of demand across local authority boundaries. However the findings for location of indoor bowls facilities in the local authorities which share a boundary with Dudley shows that Dudley is right on the edge of the centres and the nearest centre is outside the recognised 20 minutes' drive time catchment area for indoor bowling centres.

5.10 The SFC estimates for Dudley are set out in Table 5.3 below and show that at present (with the latest population estimate for Dudley of 316,665 people in 2014) there is a Dudley demand for 22 individual rinks. The 2014 estimated cost for this scale of provision is 6.6m.

5.11 This is a very high calculation – very high – and the caveat to assuming the SFC calculation is that there is no indoor bowling provision in Dudley and the market segmentation data identifies a total bowling (not just indoor) of just under 3,000 bowlers. This is a more measured assessment of total bowling demand and a reasonable working assumption is that this total bowls market could support one indoor centre of 6 rinks.

Table 5.3: Sports Facility Calculator demand for indoor bowling, swimming pools and sports halls in Dudley 2014

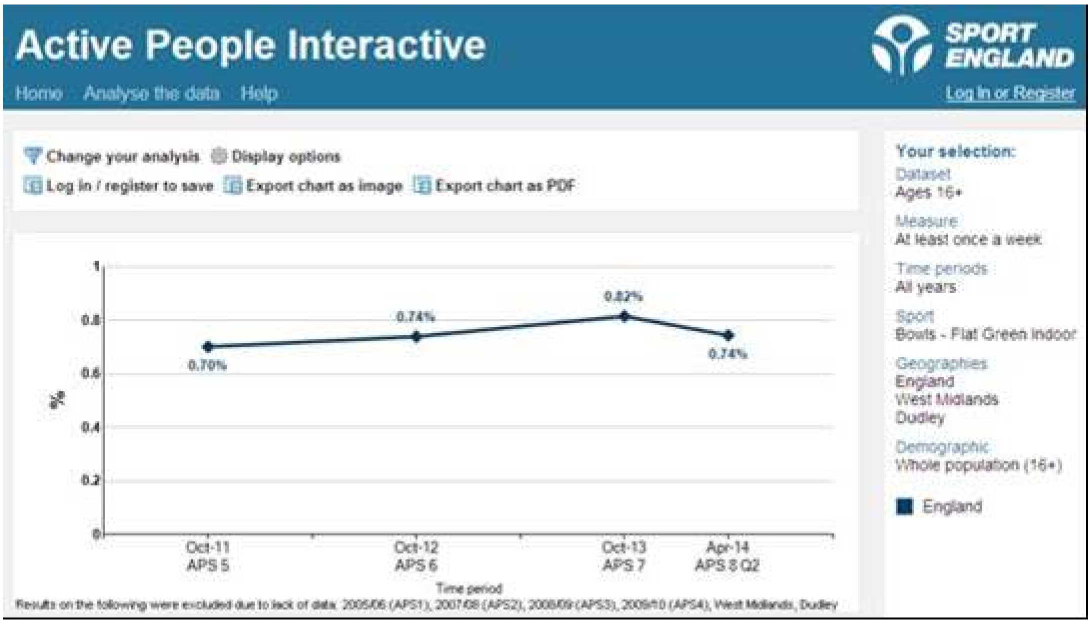
Quantity - Demand

5.12 An assessment of the demand for indoor bowling by Dudley residents can be made by setting out the rate of participation in indoor bowling as measured in the Sport England Active People survey and applying the benchmark measure of once a week participation of at least 30 minutes moderate intensity activity.

5.13 Indoor bowls data on participation is restricted to the national level because of insufficient responses in the survey at the regional and Dudley borough level to be able to provide a sample size that allows for a measured assessment of participation. This in itself does illustrate the low rate of participation in indoor bowls in the West Midlands. Participation at the England level has remained relatively constant since APS5/2011 (the earliest date at which information was gathered), though it appears to have peaked in APS7 (2013) at 0.8% of the English adult population participating in indoor bowls at least once a week.

5.14 In the first 6 months of APS 8 from October 2013 to April 2014 the rate of participation has dropped slightly to 0.74% of the England wide adult population. This is of concern because the winter period is obviously when most indoor bowling takes place.

Chart 5.1 Rate of participation in indoor bowling England wide level 2011 - 2014



<u>All bowls</u>

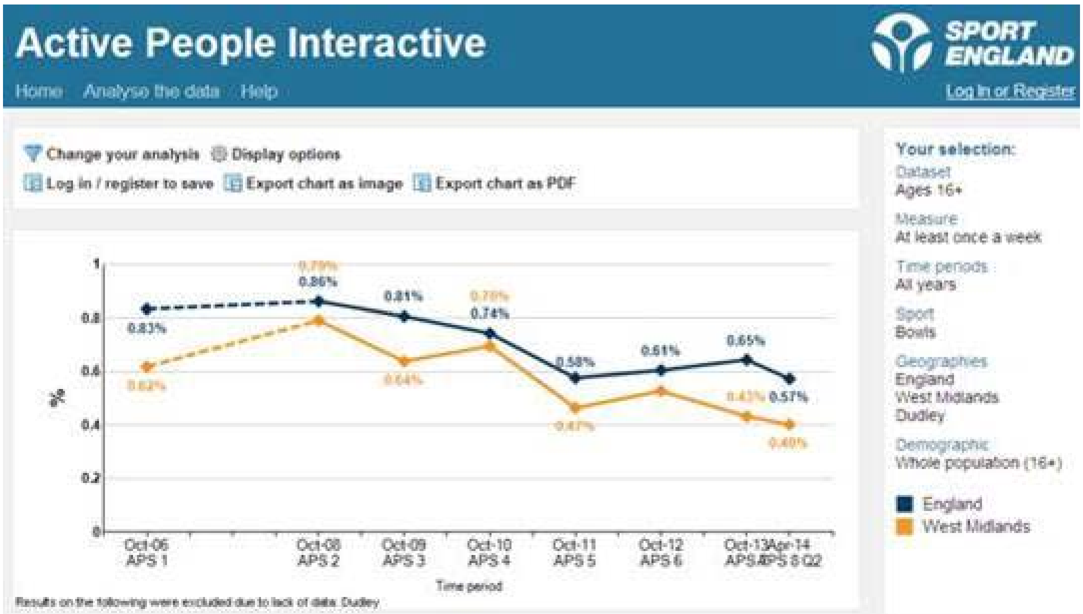
5.15 To try and provide more information on participation in bowling the rate of participation for ALL bowls is set out in Chart 5.2 overleaf and this is for England wide and at West Midlands regional level over the period of the APS1 2005 – 2006 to APS 8 2013 – 2014. The dotted line up to the start of APS 3 in 2008 reflects a small sample size and the estimate of participation. After that the small size and responses on indoor bowling were sufficient to project the rate of participation.

5.16 The data from Active People illustrates a declining picture participation in bowls. In APS 3 in 2008 -09 participation at England wide level was 0.86% of the England wide adult population playing at least once a week and 0.79% of the West Midlands adult population playing.

5.17 Since then there has been a steady decline in participation but with some peaks. In the first six months of APS 8 October 2013 – April 2014 participation at the England wide level was 0.57% of the adult population and at the West Midlands level it was 0.40% of the adult population.

5.18 In numbers of bowlers this represents 310,496 bowlers at the England wide level and 22,887 bowlers at the West Midlands regional level. Put another way the total population of Dudley at 316,815 people in 2014 is higher than the total number of adult bowlers in all types of bowling in England.

Chart 5.2: Rate of once a week participation in ALL bowls for England wide and West Midlands Region 2005 – 06 to 2013 - 14



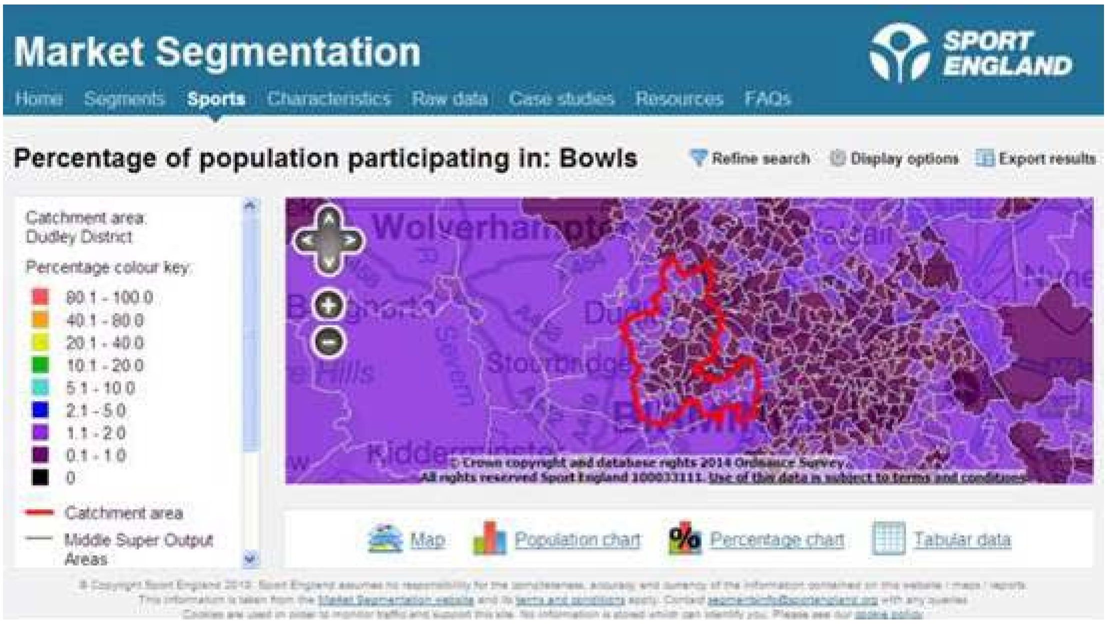
Market segmentation

5.19 The market segmentation map for participation in indoor bowling and the number of bowlers in each market segment are set out in Map 5.1 and Chart 5.3 overleaf.

5.20 Map 5.1 shows that in the areas shaded purple the rate of participation in ALL BOWLS is between 1.1 – 2% of the adult population of Dudley in 2014. Whilst in the areas shaded maroon the rate of participation is between 0.1% - 1% of the adult population of Dudley.

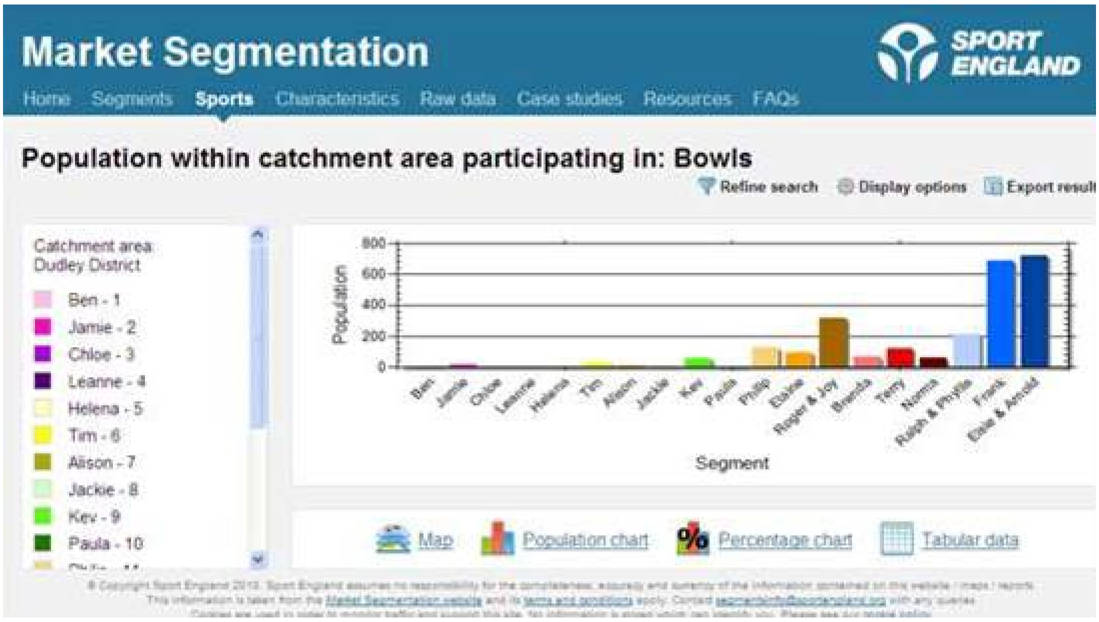
5.21 Combined and based on the market segmentation data this represents a total adult bowling population of 2,272 bowlers in Dudley in 2014. The market segmentation data also estimates the number of people who would like to play bowls but do not. The estimate is that this latent demand represents a further 583 potential bowlers. So the total actual and latent demand for <u>all bowls in Dudley</u> in 2014 is assessed as 2,855 bowlers.

Map 5.1: Percentage of the Dudley population who do play bowls (all types of bowling) 2014



5.22 In terms of the profile of bowlers across the 19 market segments and the total number in each segment this is shown in Chart 5.3 below. Bowls participation is very much concentrated in the market segments aged 45 and upwards. That is from the Philip market segments and those segments to the left of Philip in the chart. The top five and main segments which make up the bowling participation in Dudley are in order of numbers participating: Elsie and Arnold with 718 bowlers; Frank with 688 bowlers; Roger and Joy with 318 bowlers; Ralph and Phyllis's with 216 bowlers; and Terry with 119 bowlers.

Chart 5.3: Market segments for bowling in Dudley 2014



5.23 A profile of these segments together with the total population of each segment in Dudley is set out in Table 5.4 overleaf.

Table 5.4: Profile of the five top segments who play bowls Dudley 2014

Segment number	Total and (% of adult population in Dudley	Forename & brief description	Gender/age/status	Sports Most Interested in	Motivations	Barriers	How to Increase Participation	Segment participation
19	24,149 (10.1%)	Elsie and Arnold Retirement Home Singles	Male / female 66+ Widowed Retired	Walking, Dancing, Bowls, Low-impact exercise	Social Help with injury	Health problems and disability	Improved transport People to go with	Lowest participation of Group D Approx. 85% zero days
18	12,461 (5.2%)	Frank Twilight Year Gents	Male 66+ Married / single Retired	Bowls, Golf, Darts, Pool, Snooker, Walking, Fishing	Social Enjoyment	Poor health	Improved transport Cheaper admission	Medium participation for group D 75-80% zero days
13	18,118 (7.6%)	Roger and Joy Early Retirement Couples	Male / female 56-65 Retired or part-time	Swimming, Walking, Aqua Aerobics, Bowls, Sailing, Golf, Shooting, Fishing, Racquet Sports	Keeping fit To help with injury Enjoyment Taking grandchildren	Poor health Lack of interest Transport	Better facilities Improved transport	Participate once or twice a week 50-55% zero days
17	5,733 (2.4%)	Ralph and Phyllis Comfortable Retired Couples	Male / female 65+ Married Retired	Bowls, Golf, Tennis, Table tennis, Snooker, Walking, Fishing, Swimming	Social Improve performance and keep fit Enjoyment	Transport Lack of people to go with	Improved transport More people to go with	Highest participation of Group D Approx. 70% zero days
15	11,728 (4.9%)	Terry Local 'Old Boys'	Male age 56-65 Single / married Low skilled worker Job seeker	Fishing, Shooting, Pool, Utility walking, Bowls Darts, Snooker, Utility cycling	Help with injury Social	Poor health Lack of people to go with Cost	Subsidized admissions People to go with	Some low intensity participation 65-70% zero days

5.24 The total market segment population across ALL market segments for ALL types of bowling in Dudley in 2014 is 2,572 bowlers who do play and 583 people who would like to play. This provides a total market segmentation demand for ALL types of bowling in Dudley of 3,155 bowlers.

Demand assessment for indoor bowling for Dudley

5.25 So from all these sources what is the estimate of demand for indoor bowling across Dudley?

5.26 The key determinant is the rate of participation in indoor bowling. This is only available at the England wide level and it has been static/slightly declining over the 2011 – 2014 period as set out in a repeat of chart xx below. If the England wide rate of participation in October 2013 – April 2014 of 0.74% of adults (16 +) is applied to the Dudley 16 + population of 237,294 people (Source: Sport England Local Sports Profile for Dudley) this provides a Dudley indoor bowling population of 0.74 of 237,294 = 1,755 bowlers.

5.27 This figure of 1,755 indoor bowing population compares with the Sport England market segmentation estimate of bowlers across people <u>who do or would like to play ALL types of bowling</u> from the Dudley 16+ population of 3,155 bowlers.

5.28 This compares favourably with the estimate of indoor bowlers in Dudley of 1,755 people who would participate in indoor bowling.

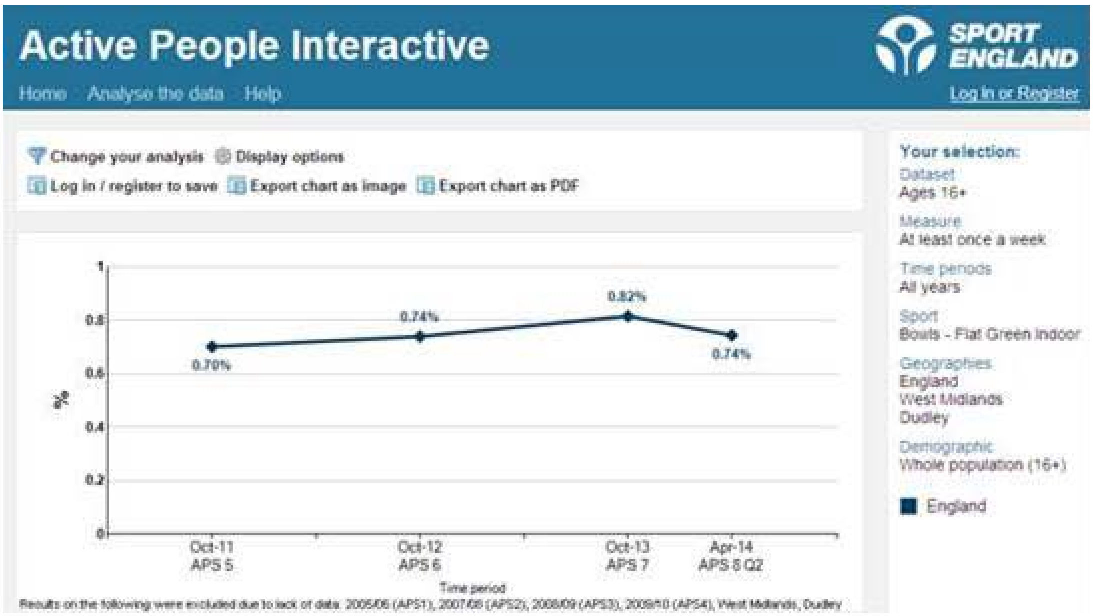
5.29 A viable indoor bowling club is around 600 members and this supports a centre of 6 rinks. Although recent studies of indoor bowling in Norfolk in four local authorities and in a County where the rate of indoor bowling participation is twice the national average the average membership of each club is in the 300 – 350 membership range. All the centres in Norfolk are trying to attract new members and without that continued existence on a membership of 300 – 350 members is very challenging.

5.30 Appling a rate of 600 members to support an indoor centre of 6 rinks then the projected Dudley demand of 1,755 members provides a demand estimate of just fewer than 18 rinks or 3 centres each of 600 members.

5.31 However this is a NATIONAL rate of participation applied to Dudley and given Dudley does not have any indoor bowling centres at present and there is no expressed interest in developing a centre, then this does appear to be an over estimate of demand.

5.32 A more reasoned assessment given there are no centres at present and the national picture of static participation in indoor bowling a more cautious approach would be to support consideration for provision on one indoor centre of 6 rinks. However this would have to be the subject of a detailed feasibility study to establish the core business case, operational business plan, sources of funding and the conditions associated with any grant aid or commercial funding.

Chart 5.4: Rate of participation in indoor bowling England wide 2011 – 2014



Quality

5.33 As there are no indoor bowling centres in Dudley the quality assessment can only be applied to West Midlands centres. A proxy for the quality of indoor bowling centres is the age at which centres opened and the date of any major modernisation (modernisation is defined as replacement of plant, changes to the building layout or purchase of any major equipment items).

5.34 A table showing the decade in which the centres opened and decade of any major modernisation is set out in Table 5.5 overleaf.

5.35 Most centres opened in the 1990's with 6 of the total 13 centres. Four centres opened in the 1970's, with 2 in the 1980's and one post 200 which was the Strichley Indoor Bowls Centre in Birmingham in 2006.

5.36 So nearly half of the stock predates a 1990 opening and is between 34 – 44 years old.

5.37 Of the 6 centres opened before 1990 5 have undergone major modernisation and so there is a good track record of modernisation of the older centres. Of the 6 centres opened in the 1990's some 3 centres have been modernised.

5.38 Overall it is an aging stock with nearly half the stock aged between 34 – 44 years old. Whilst modernisation has been good there is an increasing back log and need to modernise the remaining 6 centres which opened pre 2000. Only one centre has opened post 2000.

Table 5.5: Decade of opening and modernisation of indoor bowling centres in West Midlands Region

Decade centre opened	1970's	1980's	1990's	2000	Post 2010
No of centres	4	2	6	1	0
No of centre modernised by decade of opening	3	2	3	0	0

Accessibility

5.39 Accessibility is based on how accessible indoor bowling centres based on the three travel modes of car, (a 20 minute drive time catchment), public transport (15 minutes travel time catchment) and walking (20 minutes or 1 mile catchment area).

5.40 Access by the Dudley population to indoor bowling centres by these travel modes shows that only two centres in Birmingham and Cannock Chase would be accessible based on a 20 minute drive time. This is also at the limit of the catchment area of these centres, if not beyond it.

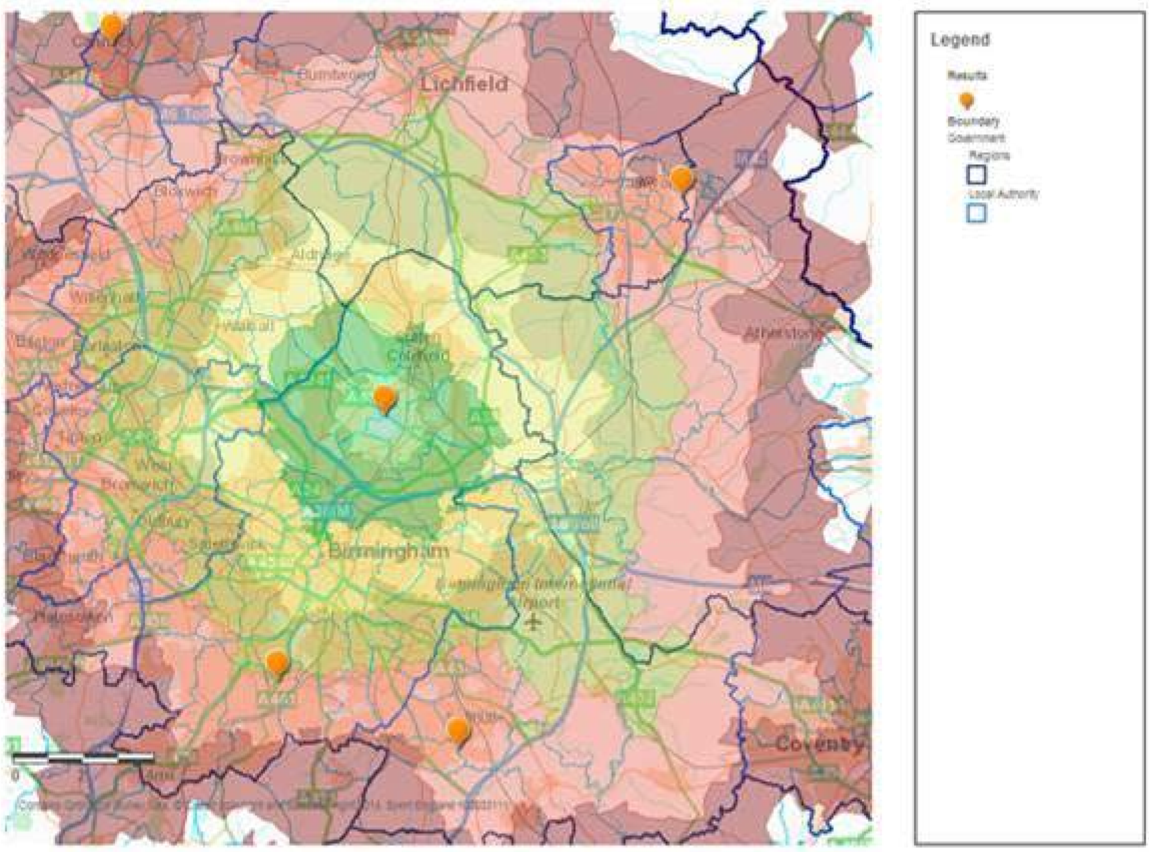
5.41 The two centres in Birmingham are: the Erdington Court Sports Club, which is a 4 rink centre operated and owned by a community organisation with access through membership; and the Stirchley Indoor Bowls Centre which is a 6 rink centre owned and operated by the City Council with pay and play access.

5.42 The Cannock Chase Centre is located at the Chase Leisure Centre, but it is only a 2 rink centre which is owned by the local authority and has pay and play access.

5.43 The nearest indoor bowling centre to the Dudley boundary is the Erdington sports club and based on this location there are no indoor bowling centres within a 20 minute drive time of the Dudley boundary.

5.44 Map 5.2 overleaf shows the up to 30 minutes' drive time catchments in different colours and in 5 minute catchments for the Erdington Centre. As the map shows the eastern edge of the Dudley boundary is in the lighter red area of the Erdington catchment which is a 25 minute drive time.

Map 5.2: 30 minute drive time catchment for the Erdington Court Indoor Bowling Centre



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5.45 So overall there is no access to indoor bowling centres for the residents of Dudley based on this location and the three other centres, also shown on the map.

Availability

5.46 Availability is assessed as the amount of amount of demand for a sports facility that can be met by the supply of facilities in an area, usually a local authority area. Availability also assess how demand is distributed across venues as this can differ based on: the amount of demand within the catchment area of any one facility does differ; the age and condition of facilities with more modem facilities attracting more demand to them; programming of venues and a programme that fits into the lifestyle and routine of customers, e.g. early morning access to swimming pools for lane swimming by commuters on their way to work.

5.47 It is important to establish if there are highs and lows in the distribution of demand and availability of venues as often a solution to meeting the overall demand can be my changing the programming of venues to re-distribute demand across several venues and establish a more even level of demand and use.

5.48 However as there are no indoor bowling centres in Dudley it is not possible to undertake any assessment on availability.

Consultation – Governing Body and other views

English Indoor Bowls Association - EIBA

5.49 The EIBA does not have a national facility strategy for indoor bowls provision although it is understood the EIBA is in discussion with Sport England about the development of a strategy. The Active People and market segmentation data for bowls and indoor bowls set out in this report is confirmed and agreed by the EIBA as the market and demand for indoor bowls in Dudley.

5.50 The EIBA does consider a case could be made for provision of a modest indoor centre in Dudley of up to 6 rinks. This is based on their assessment of the participation profile for indoor bowling in Dudley. This scale of provision is supported by the demand assessment in this report.

5.51 The EIBA does not have any capital funding available to support the provision of indoor bowls centres but would support development initiatives by a club or the commercial sector.

Summary of findings for indoor bowls

There are no indoor bowling centres in Dudley and none within a 20 or even 30 minute drive time of the authority. The nearest centres are the Erdington Court Sports Club in Birmingham which is a 4 rink centre operated and owned by a community organisation with access through membership; and the Stirchley Indoor Bowls Centre which is a 6 rink centre owned and operated by the City Council with pay and play access. There is also a centre in Cannock Chase but this is only a 2 rink centre.

In trying to assess what the demand for indoor bowling could be in Dudley the reasoned assessment is to apply the rate of participation in indoor bowling as projected by Active People. Indoor bowls data on participation is restricted to the national level because of insufficient responses in the survey at the Regional and Dudley borough level to be able to provide a sample size that allows for a measured assessment of participation. This in itself does illustrate the low rate of participation in indoor bowls in the West Midlands.

Participation at the England level has remained relatively constant since APS5/2011 (the earliest date at which information was gathered), though it appears to have peaked in APS7 (2013) at 0.8% of the English adult population participating in indoor bowls at least once a week.

In the first 6 months of APS 8 from October 2013 to April 2014 the rate of participation has dropped slightly to 0.74% of the England wide adult population. This is of concern because the winter period is obviously when most indoor bowling takes place.

If the England wide rate of participation in October 2013 – April 2014 of 0.74% of adults (16 +) is applied to the Dudley 16 + population of 237,294 people (Source: Sport England Local Sports Profile for Dudley) this projects a Dudley indoor bowling population of 1,755 bowlers.

This figure of 1,755 indoor bowing population compares with the Sport England market segmentation estimate of bowlers across people <u>who do or would like to play ALL types of bowls indoor and outdoor</u> from the Dudley 16+ population of 3,155 bowlers.

A viable indoor bowling club is around 600 members and this supports a centre of 6 rinks.

Although recent studies of nine indoor bowling in Norfolk in four local authorities and in a County where the rate of indoor bowling participation is twice the national average the average membership of each club is in the 350 - 400 membership range. All the centres in Norfolk are trying to attract new members and without that continued existence on a membership of 350 – 400 members is very challenging.

A reasoned assessment given there are no centres at present in Dudley and the national picture of static participation in indoor bowling then a cautious assessment is that there could be demand to support one indoor centre of 6 rinks. However the very big caveat is the backdrop of static participation in indoor bowling. Plus this would have to be the subject of a detailed feasibility study to establish who could provide the facility, the core business case, operational business plan, sources of funding and the conditions associated with any grant aid or commercial funding.

Views of the Governing Body

The English Indoor Bowling Association (EIBA) does not have a national facility strategy for indoor bowls provision although it is understood the EIBA is in discussion with Sport England about the development of a strategy. The Active People and market segmentation data for bowls and indoor bowls set out in this report is confirmed and agreed by the EIBA as the potential market and demand for indoor bowls in Dudley.

The EIBA does consider a case could be made for provision of a modest indoor centre in Dudley of up to 6 rinks. The EIBA does not have any capital funding available to support the provision of indoor bowls centres but would support development initiatives by a club or the commercial sector.

Overall summary of findings and way forward

There would therefore appear to be a case for the development of a 6-rink indoor bowls facility in Dudley. The Council need to decide in policy terms whether they would seek to lead on such a development. Indoor bowls could feature as part of the facility mix in any new Council lead swimming / leisure centre developments. This would obviously have an impact on operation and procurement. Alternatively the Council may seek to work with partners to deliver bowls provision.

Indoor Tennis Centres

5.52 The assessment for indoor tennis follows the same sequence of developing the evidence base applying the Sport England ANOG methodology.

Quantity

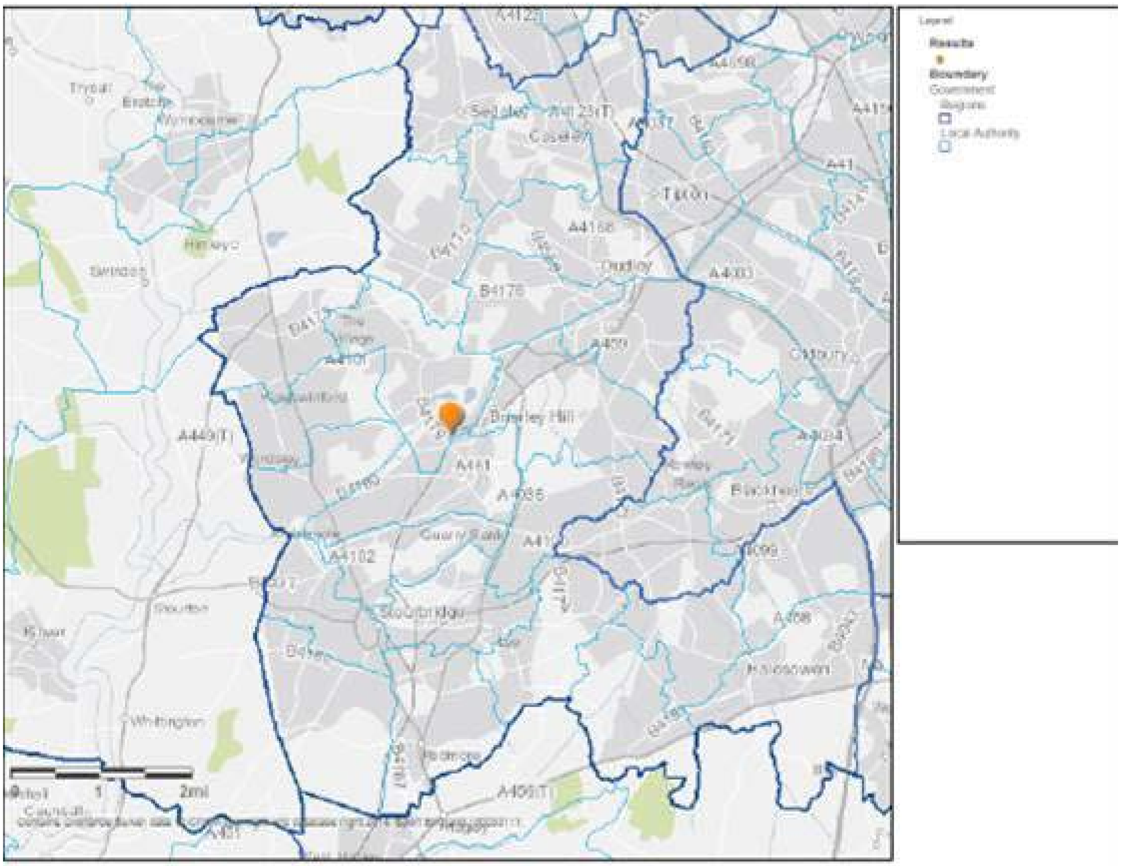
5.53 There is one indoor tennis centre in Dudley which is David Lloyd Club. It is a traditional building structure with 8 indoor courts. Access is by membership of the centre. It opened in 2001 and has not had a major modernisation.

5.54 In terms of the recognised 20 minutes' drive time catchment area for indoor tennis centres there are 3 centres in the neighbouring authorities to Dudley. These being the:

- David Lloyd centre in Bromsgrove which is an air hall of 3 courts opened in 2004 and which also operates on a membership system;
- Tipton Sports Academy in Sandwell which is a traditional building of 6 courts opened in 1998 and modernised in 2002. It is owned and operated by Sandwell Council and access is for pay and play; and
- Wolverhampton Lawn Tennis and Squash Club with a traditional building of 3 indoor courts, opened in 2000 and access is by club membership.

5.55 The location of the David Lloyd Centre in Dudley is shown in Map 5.3 overleaf.

Map 5.3: Location of the David Lloyd Indoor Tennis Centre Dudley



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5.56 So in total there are 4 indoor tennis centres including the Dudley centre, which are within a 30 minute drive time catchment of Dudley Borough. There are a further 5 centres in Birmingham. The total nine centres have 43 courts and the biggest centre is the Dudley centre with 8 indoor courts.

5.57 Five of the centres are accessed by membership of the club or centre and are commercially managed and operated. Two centres are owned and operated by clubs and also have membership access. Two centres are owned and operated by local authorities and have pay and play access.

5.58 A map of the four centres which are within a 30 minute drive time catchment area of the David Lloyd Indoor Tennis Centre in Dudley is shown in Map 5.4 overleaf. These are the centres in: Bromsgrove which is also a David Lloyd Centre; Sandwell which is the Tipton Sports Academy; Wolverhampton which is the Wolverhampton Lawn Tennis and Squash Centre; and Birmingham the Edgbaston Priory club (there are a further 3 centres in Birmingham). Details of all the centres in the neighbouring authorities to Dudley and in Birmingham follow the map and are in Table 5.6 overleaf.

Map 5.4: location of indoor tennis centres within a 30 minute drive time of the David Lloyd Indoor Tennis Centre

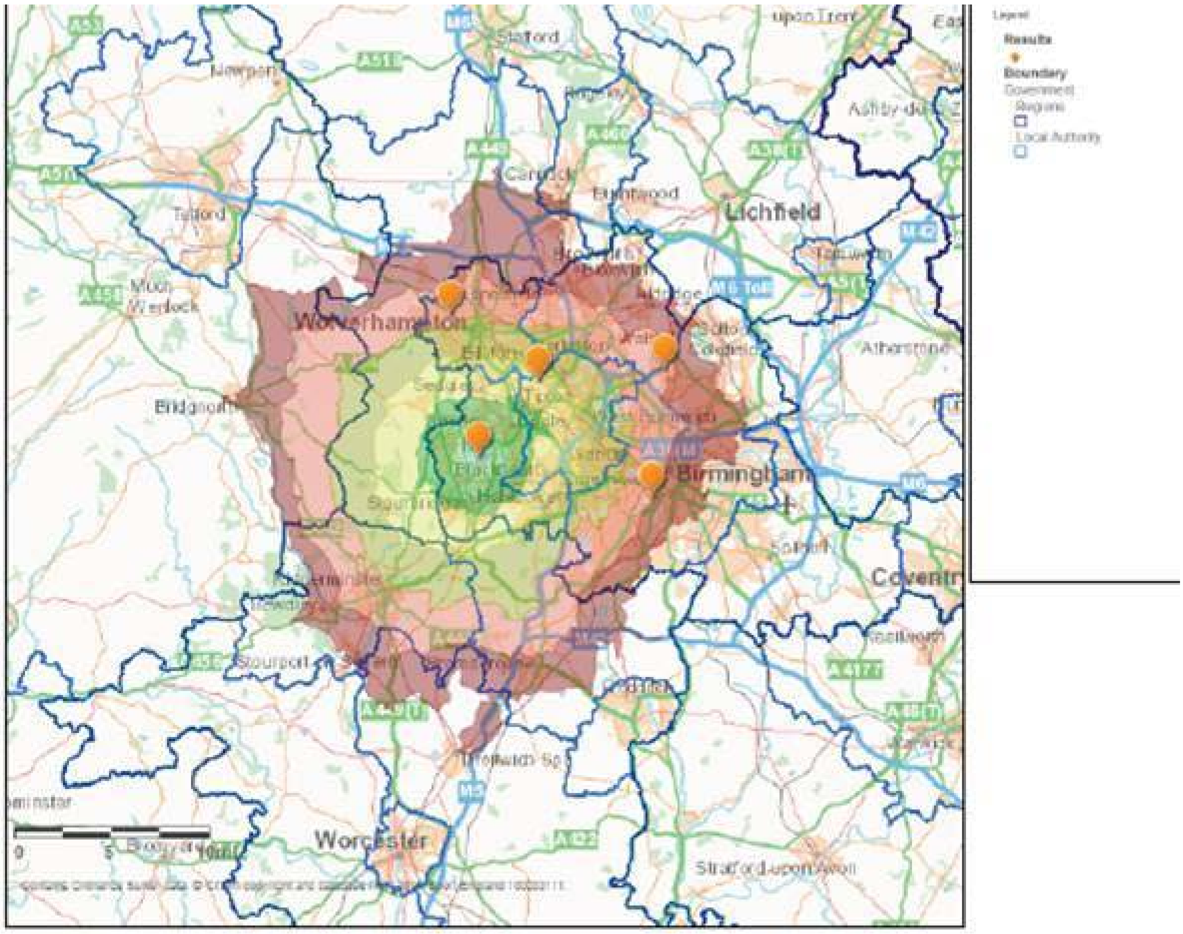

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Table 5.6: Indoor Tennis centres in Dudley and surrounding authorities and Birmingham 2014

Site Name	Facility type and structure	No of courts	Access Type	Ownership Type	Management Type	Year Built	Year Refurb	LA Name	County Name
DAVID LLOYD CLUB (DUDLEY)	Traditional	8	Registered Membership use	Commercial	Commercial Management	2001	n/a	Dudley	
BILLESLEY INDOOR TENNIS CENTRE	Traditional	6	Pay and Play	Local Authority	Local Authority (in house)	1994	2006	Birmingham	
DAVID LLOYD CLUB (BIRMINGHAM)	Traditional	7	Registered Membership use	Commercial	Commercial Management	1995	2009	Birmingham	
EDGBASTON PRIORY CLUB	Traditional	2	Registered Membership use	Commercial	Sport Club	1874	2005	Birmingham	
EDGBASTON PRIORY CLUB	Traditional	6	Registered Membership use	Commercial	Sport Club	2012	n/a	Birmingham	
SUTTON COLDFIELD TENNIS AND SQUASH CLUB	Traditional	2	Pay and Play	Sports Club	Sport Club	1988	2005	Birmingham	
DAVID LLOYD CLUB (BROMSGROVE)	Airhall (seasonal)	3	Registered Membership use	Commercial	Commercial Management	2004	n/a	Bromsgrove	Worcestershire
TIPTON SPORTS ACADEMY	Traditional	6	Pay and Play	Local Authority	Trust	1998	2002	Sandwell	
WOLVERHAMPTON LAWN TENNIS AND SQUASH CLUB	Traditional	3	Registered Membership use	Sports Club	Sport Club	2000	n/a	Wolverhampton	

Indoor tennis courts per 1,000 population

5.59 A manual assessment has been undertaken of the supply of indoor tennis in the wider area to compare provision (the totals include all facilities on the database that are currently in operation). This shows that Dudley has the highest provision based on this standard measure of courts per 1,000 population. In large part because it has the largest centre/number of courts (excluding Birmingham) and has similar levels of population (excluding Bromsgrove), the provision in Dudley is above the West Midlands Regional average.

Table 5.7: Indoor Tennis Courts per 1,000 population in Dudley and the surrounding area 2014

	Population 2014	Indoor Tennis Centres	Courts	Courts per 1000 population
Dudley	316,815	1	8	0.25
Bromsgrove	95,225	1	3	0.03
Sandwell	317022	1	6	0.01
Wolverhampton	252928	1	3	0.01
Birmingham	1103398	5	23	0.02
West Midlands Region	5,726,783	24	93	0.16

Sports Facility Calculator

5.60 The SFC does not apply to indoor tennis centres.

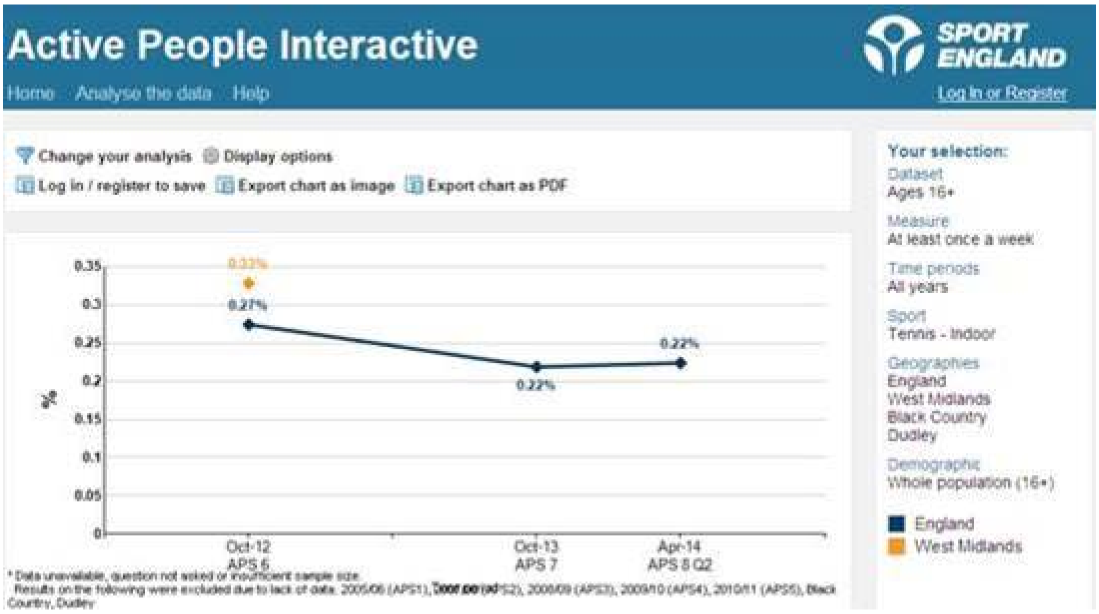
Quantity - demand

5.61 As with indoor bowling an assessment of the demand for indoor tennis can be made by setting out the rate of participation in indoor tennis as measured in the Sport England Active People survey and applying the benchmark measure of once a week participation of at least 30 minutes moderate intensity activity.

5.62 Also and as with the indoor bowls data on participation indoor tennis is restricted to the national level because of insufficient responses in the survey at the Regional, Black Country Sports Partnership and Dudley Borough level to be able to provide a sample size that allows for a measured assessment of participation.

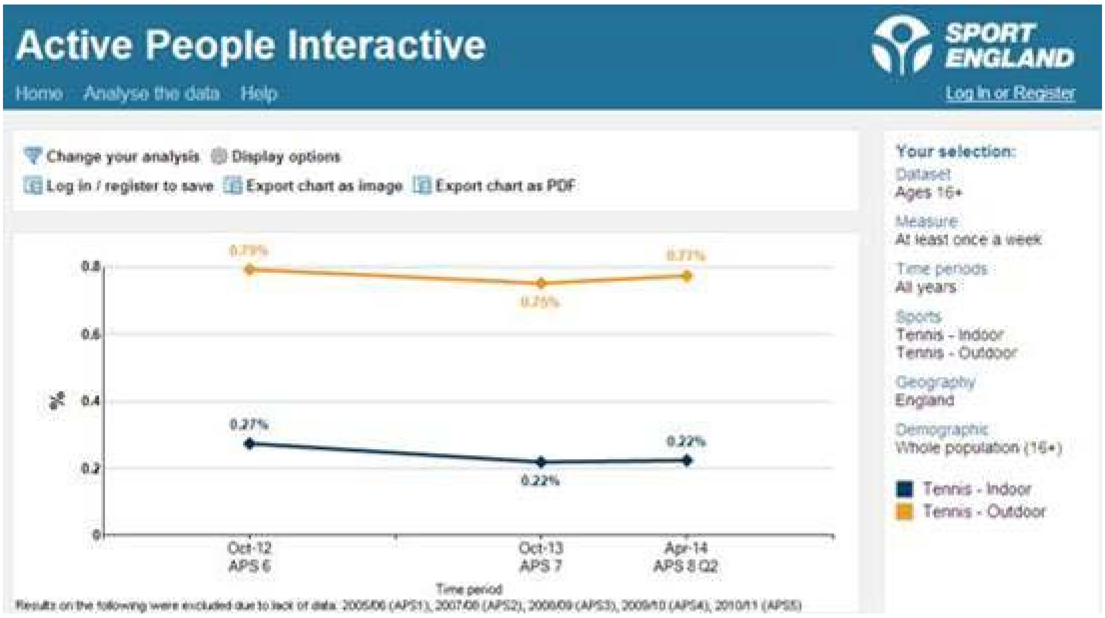
5.63 This in itself does illustrate the low rate of participation in indoor tennis at all levels. Participation at the England level has declined over the 2012 – 2014 period when data based on the at least once a week participation of 30 minutes moderate intensity is available. In 2012 some 0.27% of the adult population played indoor tennis at least once a week. In April 2014 the rate is 0.22% of the England wide adult population playing indoor tennis at least once a week.

Chart 5.5: Rate of participation in indoor tennis England wide level 2012 – 2014



5.64 Just for illustration the rate of participation by the same once a week measure for indoor and outdoor tennis is set out in Chart 5.6 below. The rate of participation in outdoor tennis whilst higher than indoor at 0.79% of the England wide population playing at least once a week (amber line), shows a similar flat lining over the 2012 – 2014 period as for indoor tennis. By April 2014 the rate of participation in outdoor tennis was almost unchanged at 0.77% of the England wide adult population.

Chart 5.6: Rate of participation in indoor and outdoor tennis England wide 2012 – 2014

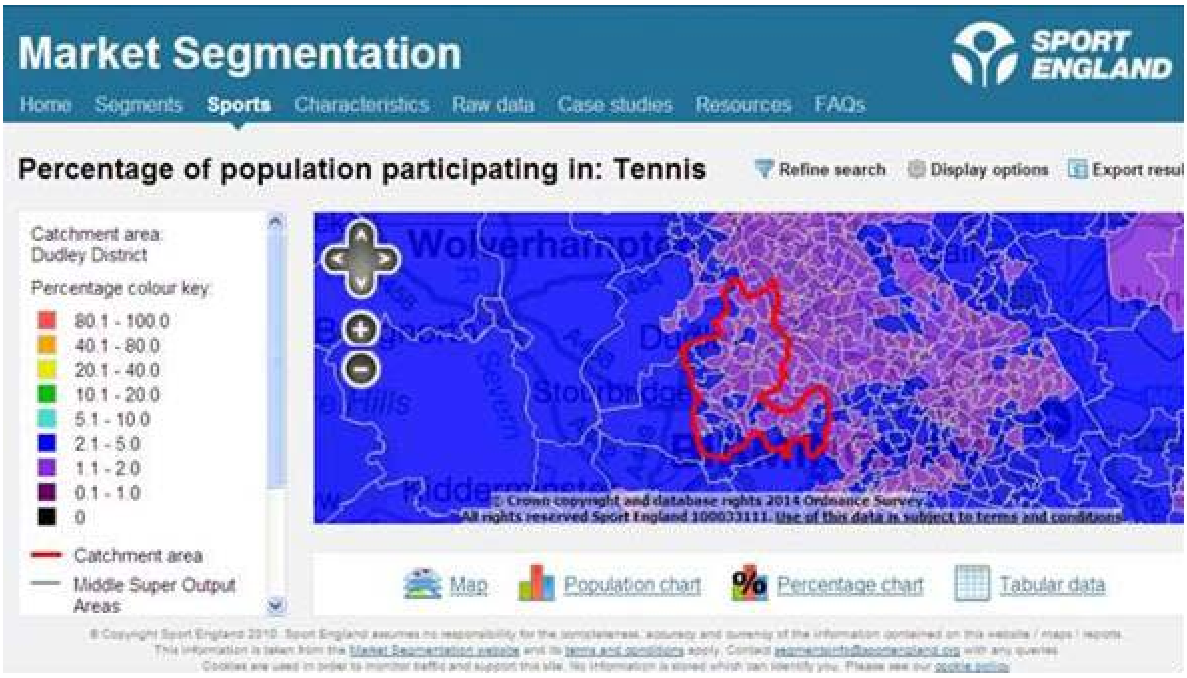


Market segmentation

5.65 The market segmentation map for participation in tennis does NOT differentiate between indoor and outdoor tennis. The market segmentation maps for people who DO play and would LIKE TO play tennis in Dudley is set out Maps 5.5 and 5.6 below.

5.66 Map 5.5 shows that the majority of Dudley's output areas are shaded purple. The rate of participation in ALL tennis in these areas is between 1.1 – 2% of the adult population of Dudley in 2014. Whilst in the smaller number of output areas shaded blue the rate of participation is between 2.1% - 52% of the adult population in Dudley. The total tennis population based on those do play tennis is 4,688 players.

Map 5.5: Percentage of the Dudley population who DO play tennis 2014



5.67 The market segmentation data also estimates the number of people who would like to play tennis but do not. The estimate is that this latent demand represents a higher than the actual participation rate. In total this latent demand is 5,375 players. This makes a total tennis population of do play of 4,688 players and would like to play of 5,375 players. So a combined total of 10,063 players across Dudley's total adult population.

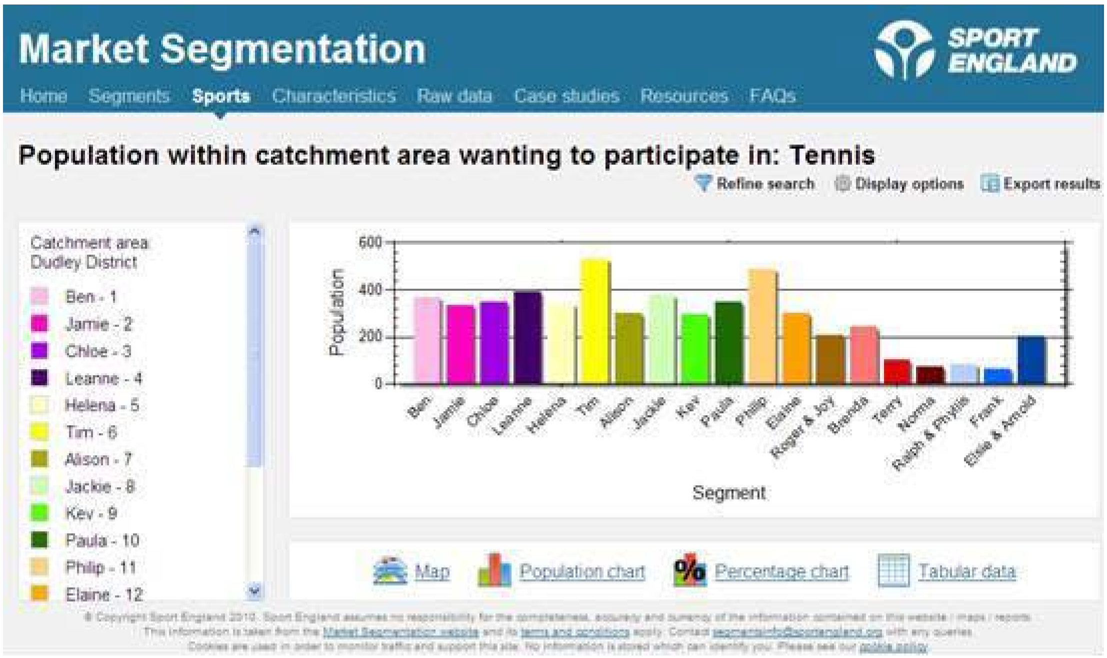
5.68 The spatial distribution of this would like to play latent demand is shown in Map 5.6 overleaf. It shows more blue output areas than in the map for the output area of do play tennis players. It is not an unusual finding for the latent demand for tennis to be higher than the participation rate for those who do play.

Map 5.6: Percentage of the Dudley population who WOULD LIKE to play tennis 2014

5.69 In terms of the profile of tennis players across the 19 market segments and the total number in each segment for both the do play tennis and would like to play tennis this is shown in Chart 5.7 below.

Chart 5.7: Market segment population totals for tennis DO PLAY in Dudley 2014

Chart 5.8: Market segment population totals for WOULD LIKE TO PLAY in Dudley 2014



5.70 The DO play tennis chart shows tennis participation is very much focused in the market segments from Ben to Chloe who are aged between 16 – 25 and have above national rates of sports participation. Then it is Tim and Philip (aged between 26 – 45) where tennis participation is highest. These two segments have national rates of participation and focus their participation across a range of sports. For Philip tennis participation is more recreational than competitive match.

5.71 For the higher numbers of latent demand for participants who would LIKE TO play tennis there is a concentration in a wider range of segments from Ben to Philip, with higher numbers in each segment. So a more even spread of would like to play tennis participation from the young segments, aged 16 – 25 up to Helena and where the play is in organised structures aiming to improve performance. Then the more casual participant for recreational tennis players aged between 26 – 45 from Tim to Elaine.

5.72 A profile of these tennis segments together with the total population of each segment in Dudley is set out in Table 5.8 overleaf.

Table 5.8: Profile of the top segments who DO PLAY or WOULD LIKE TO PLAY tennis Dudley 2014

Segment	Total and (% of adult population in Dudley	Forename & brief description	Gender/age/status	Sports Most Interested in	Motivations	Barriers	How to Increase Participation	Participation Profile
01	8,629 3.6%	Ben Competitive Male Urbanites	Male 18-25 Single Graduate professional	Rugby, Squash, Windsurfing, Tennis, Cricket, Climbing, Gym, Football	Improving performance Training for competition Social Enjoyment Keep fit	Time Interest	Better facilities People to go with Improved transport	Most active in population Approx. 20% zero days
02	10,524 4.4%	Jamie Sports Team Drinkers	Male 18-25 Single Vocational Student	Basketball, Football, Weight Training, Tennis, , Martial Arts	Social Performance Competition	Time	Better facilities People to go with Longer opening hours	Second highest participation of all types Approx. 30% zero days
03	7,435 3.1%	Chloe Fitness Class Friends	Female 18-25 Single Graduate Professional	Body combat, Netball, Aqua Aerobics, Tennis, Gym, Swimming	Weight Fitness	Time	Cost Opening Hours Facilities People to go with	Active type 30-35% zero days
04	8,575 3.6%	Leanne Supportive Singles	Female 18-25 Single Likely to have children Student / part time vocational education	Swimming, Gym, Aerobics, Tennis Dance Exercise, Body Pump,	Losing weight Activities for children	Health isn't good enough Time	Help with child care Longer opening hours Cost	Least active of A but does participate 40-45% zero days

Segment	Total and (% of adult population in Dudley	Forename & brief description	Gender/age/status	Sports Most Interested in	Motivations	Barriers	How to Increase Participation	Participation Profile
05	4,084 4.5%	Helena Career Focused Females	Female 26-35 Single Full time professional	Gym, Road Running, Dance Exercise, Tennis Skiing, Body Pump,	Losing weight Keeping fit Improving performance	Time People to go with	Longer opening hours People to go with	Very active type 30-35% zero days
06	16,349 6.8%	Tim Settling Down Males	Male 26-45 Single / married May have children Professional	Canoeing, Cricket, Cycling, Tennis, , Golf,	Improve performance Keep fit Social	Time	More free time Help with childcare	Very active type 25-30% zero days
07	7,744 3.2%	Alison Stay at Home Mums	Female 36-45 Married Housewife Children	Swimming, Badminton, Aerobics, Tennis, Exercise Bike	Taking children Losing weight Keeping fit	Time	Help with childcare Better facilities	Fairly active type 30-35% zero days
08	13,445 5.6%	Jackie Middle England Mums	Female 36-45 Married Part time skilled worker, housewife Children	Swimming, Dance Exercise, Body Pump, Tennis Aqua Aerobics	Taking children Losing weight	Time Cost Lack of interest	Help with childcare Cheaper admissions	Average 45-50% zero days
09	17,082 7.1%	Kev Pub League Team Mates	Male 36-45 Single / married May have children Vocational	Football, Darts, Snooker, Fishing, Tennis	Competition Social Enjoyment (ltd) Perform	Time Slight cost factor	More free time Cost Facilities	Less active within group B Approx. 50% zero days
10	11,282 4.7%	Paula Stretched Single Mums	Female 26-35 Single Job seeker or part time low skilled	Swimming, Utility walking, Tennis Ice Skating	Lose weight Take children	Cost Lack of childcare Poor transport Lack of interest	Improved transport Cheaper admission Help with childcare Better facilities	Least active type within Group B Approx. 60% zero days

Segment	Total and (% of adult population in Dudley	Forename & brief description	Gender/age/status	Sports Most Interested in	Motivations	Barriers	How to Increase Participation	Participation Profile
11	22,685 9.5%	Philip Comfortable Mid-Life Males	Male 46-55 Married Professional Older children	Sailing, Tennis Cycling, Gym, Jogging,	Social Taking children Improving performance Enjoyment	Time Lack of childcare	More free time Help with childcare	Most active within Group C Approx. 40% zero days
12	14,221 5.9%	Elaine Empty Nest Career Ladies	Female 46-55 Married Professional Children left home	Swimming, Walking, Aqua Aerobics, Tennis Horse Riding Gym	Keeping fit Losing weight Help with injury	Time Lack of interest	Longer opening hours More people to go with	Reasonably active type 40-45% zero days

Demand assessment for indoor tennis for Dudley

5.73 So from all these sources what is the estimate of demand for indoor tennis across Dudley?

5.74 The Sport England data sources from Active Places or the facility planning model do not consider indoor tennis in the same degree of detail as some other facility types and there is no 'ready reckoner' for assessing demand. It is possible however to assess demand in broad terms by reference to the Lawn Tennis Association (LTA) data, as follows.

5.75 In 'Priority Project Funding, Policy and Operational Procedures', the LTA states that one indoor court can serve 200 regular tennis players. Appling the England wide Active People Survey rate of 0.22% of adults regularly participating (once per week) in indoor tennis to the Dudley adult population (16+) of 237,294, there is a projected demand for 237,294 x 0.22% divided by 200 = 2.6 courts for the whole borough.

5.76 This compares with the current supply of 8 courts (the largest centre in the West Midlands region) at the David Lloyd Centre. It may well be that the rate of participation in INDOOR TENNIS in Dudley is higher than the 0.22% England wide rate of once a week participation and this does justify the provision of the 8 indoor courts. Also the David Lloyd catchment will extend beyond Dudley and there are no indoor tennis centres in Walsall or South Staffordshire.

5.77 Also the latent demand for tennis (both indoor and outdoor) as identified in the market segmentation data is very high at 5,375 potential players. It may well be that this LATENT demand is ACTUAL participation for indoor tennis in Dudley and further justifies the provision of the 8 courts at the David Lloyd Centre.

5.78 Taking the findings from all assessments into account the provision of 8 indoor tennis courts in Dudley does meet the estimated demand for indoor tennis of 2.5 courts based on the LTA methodology. Also the centre can also absorb the high latent demand for all types of tennis identified through the market segmentation data. Overall there is no supply and demand justification for provision of additional indoor tennis centres in Dudley.

Quality

5.79 There is no measure of indoor tennis centre quality. The David Lloyd centre is only 13 years old having opened in 2001 and it is a traditional permanent structure. There have only been 2 centres opened since, one being the David Lloyd Centre in Bromsgrove opened in 2004 and the Edgbaston centre opened in 2012. So the Dudley centre is the third most recent centre out of 8 centres in the Black Country and wider West Midlands. It is reasonable to assume it is of reasonable building quality.

Accessibility

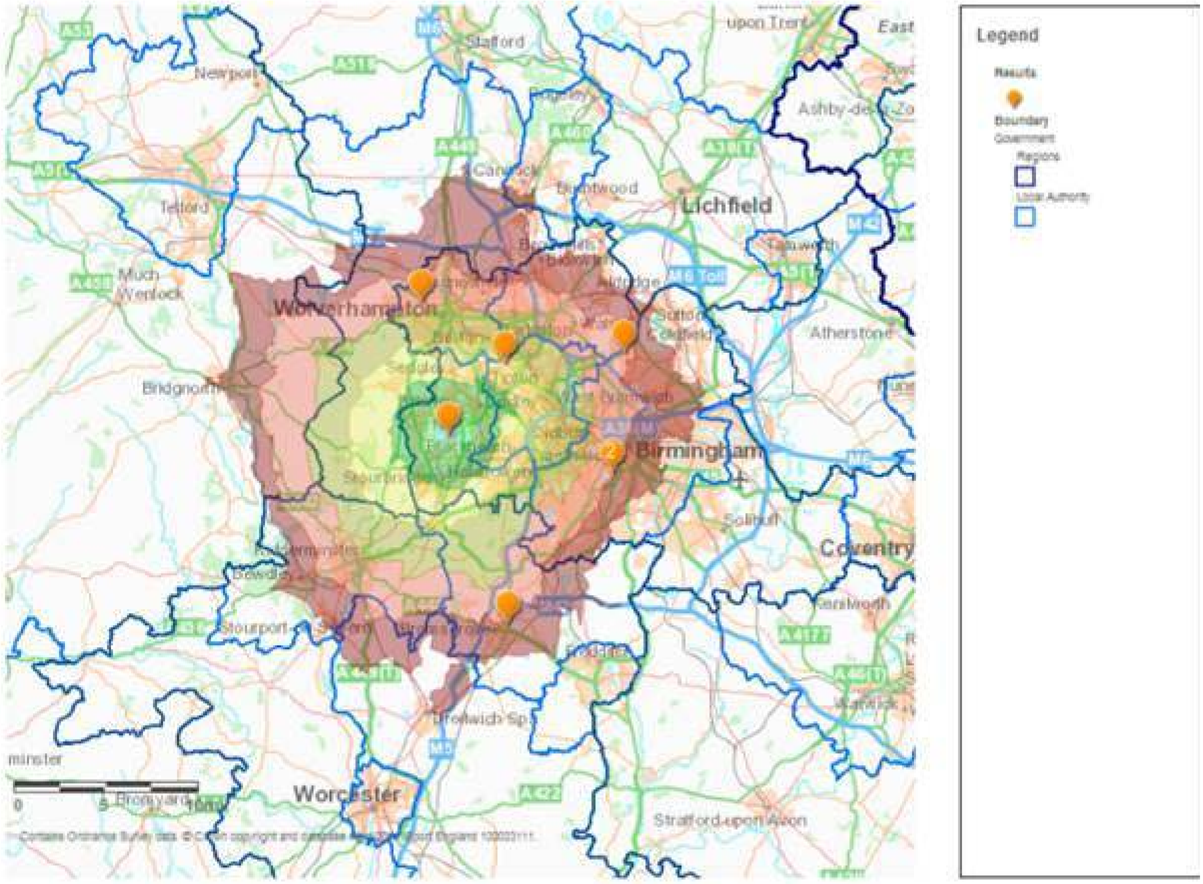
5.80 Accessibility to indoor tennis centres is based on the travel times and catchment areas for indoor tennis centres.

5.81 Map 5.7 shows the location of the David Lloyd centre and the other centres within a 30 minute drive time catchment based on 5 minute travel bands.

5.82 The Tipton Sports Academy Centre in Sandwell is on the edge of the 10 minute travel time band (shaded light yellow) and the Wolverhampton Lawn Tennis and Squash Club venue is in the 20 – 25 minute travel time band, The David Lloyd Centre in Bromsgrove is on the edge of the 25 – 30 minute travel time band. Whilst there are 2 further centres in Birmingham also in the 25 – 30 minute car travel band.

5.83 In summary, accessibility is to one centre in Dudley and 4 other centres within a 20 minute car travel time of the Dudley centre. Three of these other centres are membership based centres and one, the nearest centre, which is in the 10 minutes travel band is in Sandwell and is a pay and play centre.

Map 5.7: Accessibility to indoor tennis centre based on car travel times in 5 minute travel bands 2014



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Availability

5.84 Availability is assessed as the amount of amount of demand for a sports facility that can be met by the supply of facilities in an area, usually a local authority area.

5.85 As set out under the quantity assessment the supply of 8 indoor courts does exceed the estimated demand for indoor tennis for 2,6 courts and so based on this assessment there are enough courts available to meet demand.

5.86 The David Lloyd Centre is a commercial centre and only available to registered members. Four of the other total nine centres are also only available to registered members and are commercially managed and operated. Two centres are owned and operated by clubs one has membership access and one has pay and play, this being the Sutton Coldfield Tennis and squash club with 2 courts. . Two centres are owned and operated by local authorities and have pay and play availability. These being the Tipton Sports Academy centre in Sandwell (6 courts) and the nearest centre to Dudley and the Billesley Centre (6 courts) in Birmingham.

5.87 So availability to indoor tennis centre for learning the activity and for recreational pay and play is restricted. It is not possible in Dudley and only 3 centres within a 20 minute drive time of the Dudley centre and with a total of 14 courts offer pay and play availability.

5.88 In summary there is good availability to six out of nine centres for people who wish to take out a membership of the centre. However availability for recreational pay and play is restricted to three out of the nine centres and which are two local authority centres and one club centre offering pay and play availability. These provide 14 out of the total 43 indoor courts within a 30 minute drive time of the Dudley centre.

5.89 So 32% of the total indoor tennis court supply is available for pay and play and 68% is available for registered members.

Governing Body and other views

5.90 It is understood the Lawn Tennis Association (LTA) as part of its overall strategy “Places to play” will publish a new Facility Strategy with new LTA funding criteria and guidelines in 2015. There is not a more local LTA facility strategy. Dudley Borough does not currently feature as a priority area in the national plan. Dudley has been selected for the next phase of prioritisation work across the West Midlands.

5.91 The LTA undertakes a facility audit and assessment once an area becomes a priority for the Association. If Dudley becomes a priority area then the LTA would look at the participation need and facility stock needed to support this at that stage. This relates more to outdoor rather than indoor facilities and is focused on clubs but there is also a commitment to invest in improvement of existing public courts in parks for public recreational use as a way of encouraging casual play.

5.92 In any LTA assessment local demand issues would be completed by the field team as part of the participation audit. As regards funding, loan funding is available from the LTA as well as support in searching for external funding. However the new Facilities Strategy is going to set out new funding criteria from the LTA for capital projects.

5.93 The local assessment of need for indoor courts set out in this report does provide a context for indoor tennis centre need that would be considered by the LTA. It is not however supportive of increased provision of indoor tennis centres. The LTA do not view Dudley as a priority for indoor court provision at this time.

Summary of findings for indoor tennis centres

There is one indoor tennis centre in Dudley which is the David Lloyd Centre. It is a traditional building structure with 8 indoor courts. Access is by membership of the centre. It opened in 2001 and has not had a major modernisation. It is the largest centre in the Black Country and wider West Midlands, including Birmingham.

In terms of the recognised 20 minutes’ drive time catchment area for indoor tennis centres there are 3 centres within the Dudley area, these being:

- David Lloyd centre in Bromsgrove which is an air hall of 3 courts opened in 2004 and which also operates on a membership system;

- Tipton Sports Academy in Sandwell which is a traditional building of 6 courts opened in 1998 and modernised in 2002. It is owned and operated by Sandwell Council and access is for pay and play; and

- Wolverhampton Lawn Tennis and Squash Club with a traditional building of 3 indoor courts, opened in 2000 and access is by club membership.

The Sport England data sources from Active Places or the facility planning model does not consider indoor tennis in the same degree of detail as some other facility types and there is no ‘ready reckoner’ for assessing demand. It is possible however to assess demand in broad terms by reference to the Lawn Tennis Association (LTA) data, as follows.

In ‘Priority Project Funding, Policy and Operational Procedures’, the LTA states that one indoor court can serve 200 regular tennis players. Appling the England wide Active People Survey rate of 0.22% of adults regularly participating (once per week) in indoor tennis to the Dudley adult population (16+) of 237,294, there is a projected demand for 237,294 x 0.22% divided by 200 = 2.6 courts for the whole borough. There is no participation rate from Active People for indoor tennis below the national level.

The demand compares with the current supply of 8 courts (the largest centre in the West Midlands region) at the David Lloyd Centre. It may well be that the rate of participation in INDOOR TENNIS in Dudley is higher than the 0.22% England wide rate of once a week participation and this does justify the provision of the 8 indoor courts. Also the David Lloyd catchment will extend beyond Dudley and there are no indoor tennis centres in Walsall or South Staffordshire.

Also the latent demand for tennis (indoor and outdoor) as identified in the market segmentation data is very high at 5,375 potential players across Dudley. It may well be that this LATENT demand is ACTUAL participation for INDOOR tennis in Dudley and further justifies the provision of the 8 courts at the David Lloyd Centre.

Taking the findings from all assessments into account the provision of 8 indoor tennis courts in Dudley does meet the estimated demand for indoor tennis of 2.5 courts based on the LTA methodology. Also the centre can also absorb the high latent demand for all types of tennis identified through the market segmentation data. Overall there is no supply and demand justification for provision of additional indoor tennis centres in Dudley.

Access to play indoor tennis is possibly an issue. The Dudley centre is membership based so access for non-members for recreational pay and play is not possible. Six out of the nine centres in the West Midlands are membership based.

Access for recreational pay and play is restricted to three centres of which two are local authority centres and one a club centre. The nearest pay and play centre for Dudley residents is the Tipton Sports Academy in Sandwell.

Pay and play courts total 14 out of the total 43 indoor courts across the West Midlands. Put another way 32% of the total indoor tennis court supply is available for pay and play and 68% is available for registered members.

Views of the Lawn Tennis Association

It is understood the Lawn Tennis Association (LTA) as part of its overall strategy "Places to Play" will publish a new Facility Strategy with new LTA funding criteria and guidelines in 2015. There is not a more local LTA facility strategy. Dudley Borough does not currently feature as a priority area in the national plan. Dudley has been selected for the next phase of prioritisation work across the West Midlands.

The LTA undertakes a facility audit and assessment once an area becomes a priority for the Association. If Dudley becomes a priority area then the LTA would look at the participation need and facility stock needed to support this at that stage. This relates more to outdoor rather than indoor facilities and is focused on clubs and there is a commitment to invest in improvement of existing public courts in parks for public recreational use as a way of encouraging casual play.

In any LTA assessment local demand issues would be completed by the field team as part of the participation audit. As regards funding, loan funding is available from the LTA as well as support in searching for external funding. However the new Facilities Strategy is going to set out new funding criteria from the LTA for capital projects.

The local assessment of need for indoor courts set out in this report does provide a context for indoor tennis centre need that would be considered by the LTA. It is not however supportive of increased provision of indoor tennis centres. The LTA do not view Dudley as a priority for indoor court provision at this time.

Overall summary of findings and way forward

There would not appear to be a strong case for the development of additional indoor tennis provision across Dudley, it is not a priority for the LTA. However if the provision of accessible indoor tennis provision is important to the Council they may decide to include 4-court provision in any new multi-sport development or alternatively seek to work in partnership with David Lloyd to increase access.

Health and Fitness Centres

5.94 Sport England defines health and fitness suites as those facilities providing fitness stations for both cardiovascular and strength training, more commonly known as gym, and excludes spaces for aerobics and dance activities (which are dealt with separately). The assessment below is based on the tools available from Sport England (although these are more limited than for other facilities).

Quantity - supply

5.95 There are 34 health and fitness venues providing a total of 1,811 health and fitness stations across the borough. Of these 22 are available on a pay and play basis, 4 are for registered members and 8 are for a combination of membership of either a sports club or community organisation.

5.96 Pay and play is the most prominent access type with 1,388 stations, some 76.6% of the total number of stations. Some 17.1% of the total stations are for registered membership use and the remaining 102 stations (6.3%) are for private or community association use. So the effective number of 'public' stations in the borough is 1,388 stations.

5.97 There are three local authority health and fitness venues, these being:

- Crystal Leisure Centre opened in 1990 and refurbished in 2011 and which has 90 stations;
- Dudley Leisure Centre opened in 1978 and refurbished in 2008 and which has 80 stations; and
- Halesowen Leisure Centre opened in 1963 and was refurbished in 2008, it has 70 stations.

From the benchmarking analysis we know the centres are in line with norms in terms of membership numbers but are underperforming in financial terms, particularly income levels.

5.98 Analysis of the performance of the current Dudley Council facilities reveals that although gym income is a main income generator for a leisure centre, the levels of income at the Council facilities falls below the level of benchmark (income per station), which should be circa £7,800 per station. A review of the sites would indicate that the gyms are well laid out, with quality equipment and are well staffed, but the low level of income is likely to be as a result of too many pieces of equipment for demand (Dudley Leisure Centre), and also the lower than average prices (Crystal and Halesowen have average number of members per station). This is also supported by the level of income per m2, which is below benchmark, but the number of visits per m2 is above benchmarks. The general performance of the Council facilities is poor.

5.99 The location of health and fitness centres which are within a 20 minute drive time catchment of the Pure Gym at Brierley Hill is set out in Map 5.8 overleaf. (Note: this venue is selected because of its central location in Dudley). The map shows there are 18 other health and fitness venues within a 20 minute drive time of this venue. (Note the numbers refer to a listing of the venues by number but the details of each venue are not available as an attachment to the map).

Map 5.8: Location of health and fitness centres in within a 20 minute drive time of the Pure Gym at Brierley Hill

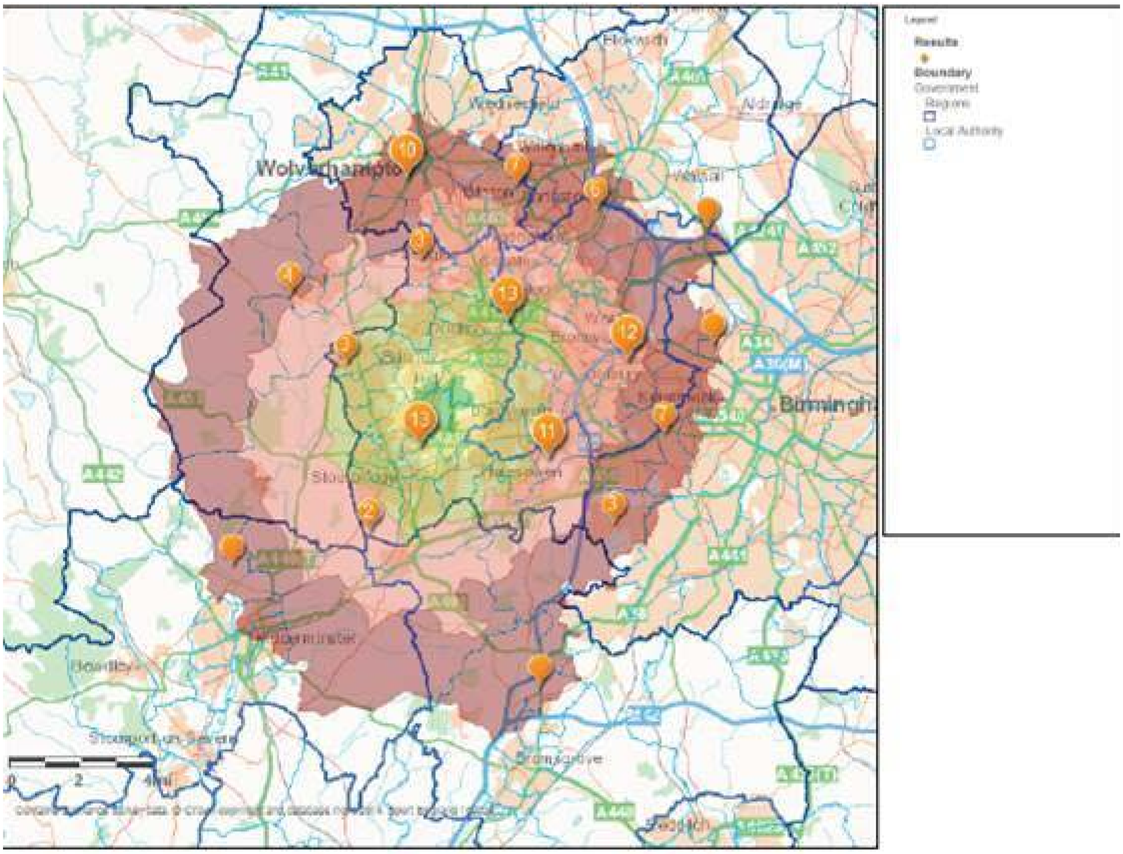

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Table 5.9: List of all health and fitness venues in Dudley 2014

Site Name	Facility Type	Number of stations	Facility Status	Access Type	Ownership Type	Management Type	Year Built	Year Refurbished
ABSOLUTE FITNESS	Health and Fitness Suite	105	Operational	Pay and Play	Commercial	Commercial Management	1997	2007
ACTIVE4LESS (DUDLEY)	Health and Fitness Suite	24	Operational	Pay and Play	Commercial	Commercial Management	1998	2013
BISHOP MILNER CATHOLIC COLLEGE	Health and Fitness Suite	10	Operational	Private Use	Voluntary Aided School	School/College/University (in house)	2005	n/a
BODYWISE HEALTH CLUB	Health and Fitness Suite	50	Operational	Pay and Play	Commercial	Commercial Management	2007	n/a
COSELEY LEISURE CENTRE	Health and Fitness Suite	16	Operational	Pay and Play	Community school	School/College/University (in house)	2011	n/a
CRYSTAL LEISURE CENTRE	Health and Fitness Suite	90	Operational	Pay and Play	Local Authority	Local Authority (in house)	1990	2011
DAVID LLOYD CLUB (DUDLEY)	Health and Fitness Suite	150	Operational	Registered Membership use	Commercial	Commercial Management	2001	2013
DUDLEY COLLEGE	Health and Fitness Suite	23	Operational	Pay and Play	Further Education	School/College/University (in house)	2012	n/a
DUDLEY LEISURE CENTRE	Health and Fitness Suite	80	Operational	Pay and Play	Local Authority	Local Authority (in house)	1978	2008
FIGURES MENS GYM	Health and Fitness Suite	38	Operational	Pay and Play	Commercial	Commercial Management	1990	2010
FITNESS FACTORY	Health and Fitness Suite	90	Operational	Pay and Play	Commercial	Commercial Management	1995	2009
FITNESS4LESS (BRIERLEY HILL)	Health and Fitness Suite	100	Operational	Pay and Play	Commercial	Commercial Management	2000	2013
FORTNOCKS HEALTH CLUB	Health and Fitness Suite	80	Operational	Pay and Play	Commercial	Commercial Management	1992	2010
GYM 212	Health and Fitness Suite	54	Operational	Pay and Play	Commercial	Commercial Management	2000	2007
HALESOWEN COLLEGE SCHOOL	Health and Fitness Suite	13	Operational	Private Use	Further Education	School/College/University (in house)	2003	n/a
HALESOWEN LEISURE CENTRE	Health and Fitness Suite	70	Operational	Pay and Play	Local Authority	Local Authority (in house)	2005	2008

Site Name	Facility Type	Number of stations	Facility Status	Access Type	Ownership Type	Management Type	Year Built	Year Refurbished
KING EDWARD VI COLLEGE STOURBRIDGE	Health and Fitness Suite	9	Operational	Sports Club / Community Association	Further Education	School/College/University (in house)	1998	n/a
KLASSICS HEALTH AND LEISURE	Health and Fitness Suite	32	Operational	Registered Membership use	Commercial	Commercial Management	1997	2010
LE CLUB MERRY HILL DUDLEY	Health and Fitness Suite	29	Operational	Registered Membership use	Commercial	Commercial Management	2002	n/a
LEASOWES SPORT CENTRE	Health and Fitness Suite	23	Operational	Pay and Play	Community school	School/College/University (in house)	2009	n/a
OLD SWINFORD HOSPITAL	Health and Fitness Suite	19	Operational	Private Use	Voluntary Aided School	Health Authority	2000	2008
PRO-FITNESS HAL ZONE LTD	Health and Fitness Suite	43	Operational	Pay and Play	Commercial	Commercial Management	1996	2013
PURE GYM (BRIERLEY HILL)	Health and Fitness Suite	220	Operational	Pay and Play	Commercial	Commercial Management	2002	2013
STEEL WORKS GYM	Health and Fitness Suite	101	Operational	Pay and Play	Commercial	Commercial Management	1985	2006
SUMMERHILL SCHOOL	Health and Fitness Suite	9	Operational	Sports Club / Community Association	Community school	Private Contractor (PPP/PFI)	2003	n/a
THE EARLS HIGH SCHOOL	Health and Fitness Suite	7	Operational	Sports Club / Community Association	Community school	School/College/University (in house)	1999	n/a
THE ELLOWES HALL SPORTS COLLEGE	Health and Fitness Suite	28	Operational	Pay and Play	Foundation School	School/College/University (in house)	2006	n/a
THE FITNESS EMPORIUM	Health and Fitness Suite	30	Operational	Pay and Play	Commercial	Commercial Management	2002	2010
THE HIGH ARCAL SCHOOL	Health and Fitness Suite	22	Operational	Sports Club / Community Association	Foundation School	School/College/University (in house)	1999	2007
THORNS COMMUNITY COLLEGE	Health and Fitness Suite	51	Operational	Pay and Play	Community school	School/College/University (in house)	1983	2013
UNIQUE FITNESS FOR LADIES ONLY	Health and Fitness Suite	22	Operational	Pay and Play	Commercial	Commercial Management	2014	n/a

Site Name	Facility Type	Number of stations	Facility Status	Access Type	Ownership Type	Management Type	Year Built	Year Refurbished
VELOCITY HEALTH & FITNESS (BIRMINGHAM DUDLEY)	Health and Fitness Suite	100	Operational	Registered Membership use	Commercial	Commercial Management	2000	2006
WINDSOR HIGH SCHOOL AND SIXTH FORM	Health and Fitness Suite	23	Operational	Private Use	Foundation School	School/College/University (in house)	2005	2010
WORKOUTZ HEALTH AND FITNESS	Health and Fitness Suite	50	Operational	Pay and Play	Commercial	Commercial Management	2010	n/a

Health and fitness facilities per 1,000 population

5.100 A manual calculation of the pro rata provision of health and fitness centres in Dudley and the neighbouring local authorities is set out in Table 5.10 below. This includes all facilities on the database that are currently in operation/under construction, including private facilities):

Table 5.10: Health and fitness venues and stations per 1,000 population in Dudley and neighbouring authorities (including Birmingham)

	Population 2014	Number of H and F venues	Number of stations	Stations per 1,000 population
Dudley	316,815	34	1,811	0.57
Bromsgrove	95,225	12	588	0.61
Sandwell	317022	33	2,093	0.66
Wolverhampton	252928	22	1,539	0.60
Birmingham	1103398	1295	6,266	0.56

5.101 Local provision based on this benchmark measure of stations per 1,000 population is lowest in Dudley and Birmingham, when compared with all the other local authorities. The provision in Dudley 0.57 stations per 1,000 populations whilst it is 0.56 stations in Birmingham.

5.102 Noticeably, Sandwell has a very similar total population to Dudley and which only differs by 207 people in 2014. The number of venues only differs by 1, there being 34 health and fitness venues in Dudley and one less in Sandwell. However Sandwell has 2,093 stations compared with 1,811 in Dudley. The standard per 1,000 population in Sandwell is the highest in the area at 0.66 stations, compared with 0.57 in Dudley.

Quantity - Demand

5.103 The Active People survey for health and fitness categorises health and fitness as gym activities. Given its popularity there are sufficient respondents to be able to set out the rate of once a week participation in gym at the Dudley, Black Country and West Midlands Region level for the Active People surveys 2006 - 2014. This is set out in Chart 5.9 overleaf.

5.104 As the chart shows the rate of once a week gym participation in Dudley (maroon line) has fluctuated considerably over the course of the Active People surveys. It being the same as the Black Country rate (yellow line) at 7.2% of the adult population doing gym at least once a week in October 2006.

5.105 Between then and October 2013 the Dudley rate has fluctuated between 8.1% of adults doing gym in October 2009, to then fall to 5.8% of adults the following year. It then increases to 8.7% of the adult population in October 2012, to then fall to 6.4% of all adults doing gym at least once a week in October 2013 and back to 8.5% by April 2014.

5.106 The Black Country rate (amber line) has not fluctuated so dramatically and has shown a steady increase from its low of 6% of adults doing gym once a month in October 2008 to 8.5% of all adults in April 2014.

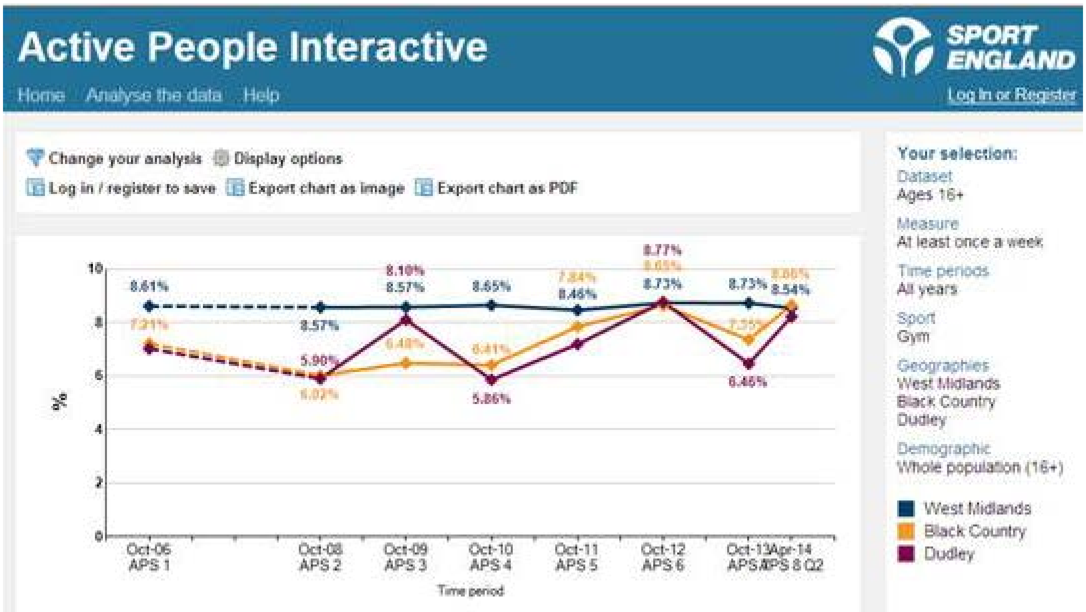
5.107 The West Midlands rate (blue line) has hardly changed from 8.6% of all adults doing gym at least once a week in October 2006 to 8.5% in April 2014.

5.108 The reasons for the volatility of the Dudley rate are hard to explain, especially given the very high percentage at 76% of the total number of stations being pay and play. So the opportunity to do gym without taking out a membership would not appear to be a barrier or constraint to participation. Lack of access to pay and play gym facilities is shown to be a barrier to participation.

5.109 Gym participation is vulnerable to changes in individual's ability and willingness to pay for a membership and is a big determinant of changes in participation levels. Whilst this could be a factor in the volatility of the Dudley participation levels it is not consistent with the smoother rate of participation at the Black Country and even smother West Midlands level.

5.110 A most likely explanation is the sample size of respondents to the Active People survey. At the Dudley level the number of respondents to questions about gym will be very small but it will be larger at the Black Country and much larger at the West Midlands level. The bigger areas could therefore have a larger number of respondents to actual gym participation and this shows that participation does not fluctuate – much. At the Dudley level with far fewer respondents it could present a picture of wide variation in gym participation.

Chart 5.9: Active People Rate of once a week participation in gym activities for West Midlands Region. Black Country and Dudley Borough 2006 – 2014



5.111 Based on the APS October 2013 – April 2014 finding of 6.4% of Dudley adults participating in gym activities then there are just over 15,100 adults participating in gym activities at least once a week in 2014. This is based on 6.4% of the Dudley adult population in 2014 of 237,294 people.

Market segmentation

5.112 The market segmentation map for participation in gym does include aerobics yoga and fitness classes as well as individual gym activities. Also market segmentation participation is based on measuring at least ONCE A MONTH participation. Whereas the Active People benchmark data and charts used in the report is based on at least ONCE A WEEK participation.

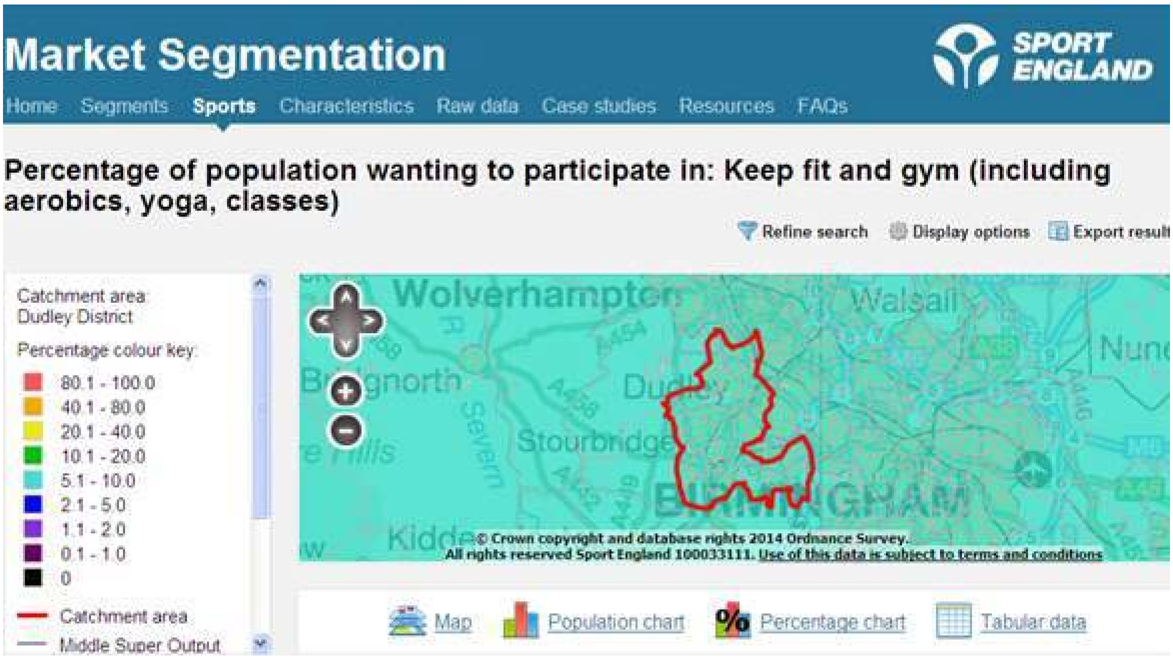
5.113 The market segmentation maps for people who DO play and would LIKE TO do gym and keep fit for Dudley is set out Maps 5.8 and 5.9 below.

5.114 Map 5.8 shows that for all of the Dudley area and in virtually all of the surrounding areas the at least once a month participation rate in gym <u>and keep fit</u> is between 10.1% - 20% of the Dudley adult population. This compares with Active People survey findings of 6.4% of the Dudley adult population doing gym at least once a week between October 2013 – April 2014.

Map 5.8: Percentage of the Dudley population who DO gym, aerobics, yoga and classes

5.115 The market segmentation data and map for the number of people who would like to do gym and keep fit at least once a month set out in map xx below shows a latent demand of between 5.1% - 10% of the Dudley adult population and the same latent demand rate for the surrounding area.

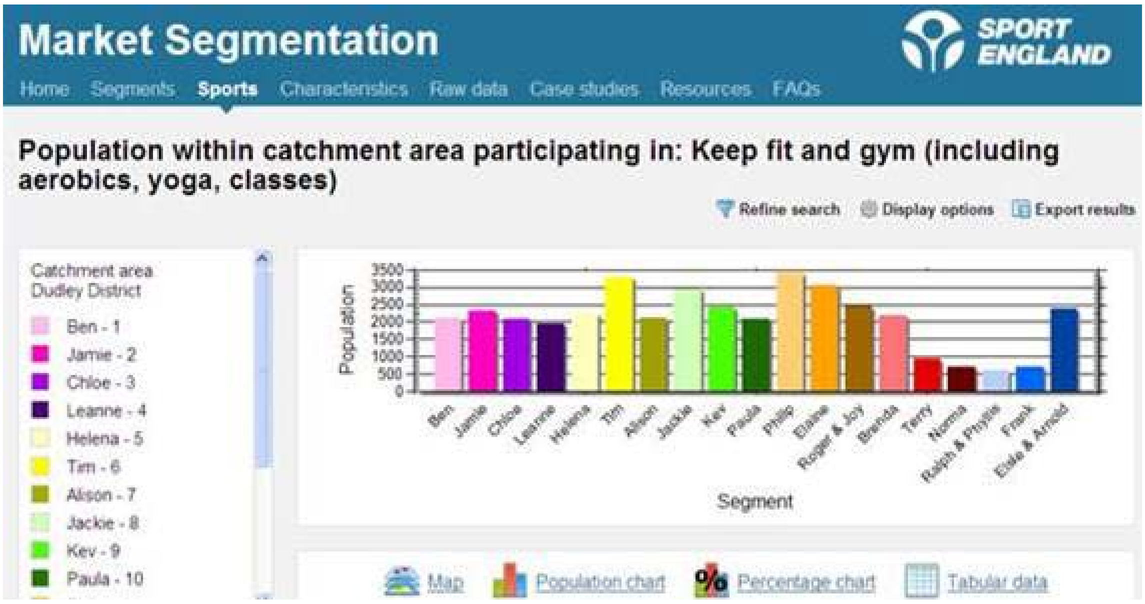
Map 5.9: Percentage of the Dudley population who WOULD LIKE TO DO gym, aerobics, yoga and classes



5.116 In terms of the profile of people who do and would like to do gym and keep fit across the 19 market segments and the total number in each segment this is shown in Charts 5.10 and 5.11 below.

5.117 Both charts show how broad based gym and keep fit is across the 19 segments with 14 of the first 19 segments having over 2,000 people in the Dudley adult population doing gym and keep fit at least once a month. The activity is very broad based in terms of age and gender. Also the oldest market segment which is Elsie and Arnold (aged 66+) has over 2,000 people doing gym and keep fit activities at least once a month.

Chart 5.10: Market segment population totals for DO gym and keep fit activities in Dudley



5.118 For the would like to do gym and keep fit classes the Dudley profile is similar in its spread across the same range of 14 market segments, although the first four segments from Ben to Leanne (aged between 16 – 25) have a much lower propensity to do gym than the other segments. There are then 11 segments from Helena to Brenda (aged between 26 – 45) where there are over 1,000 adults in each segment in Dudley who would like to do gym and keep fit classes at least once a month.

Chart 5.11: Market segment population totals for WOULD LIKE TO do gym and keep fit activities in Dudley

5.119 Based on the total findings of gym yoga and keep fit classes at least once a month it is 16,935 adults. This provides a total market segmentation participation of 56,876 people. This represents some 23.9% of the adult population in Dudley in 2014.

5.120 It is a challenging total to believe, however, as the market segmentation data does show gym and keep fit activities do have a board base appeal across 14 of the total 19 market segments and is the activity/sport with the broadest based appeal across both sexes and all ages.

Demand assessment for health and fitness

5.121 The Sport England tools of Active Places or the facility planning model do not consider health and fitness in the same degree of detail as other facilities, and there is no ‘ready reckoner’ for assessing demand. The Fitness Industry Association has devised a model that provides guidance on the supply of stations against the current anticipated demand.

5.122 The model defines health and fitness users as all people participating in health and fitness, including private club members and users of local authority facilities. The model is based on peak period demand, and the peak times are identified as follows:

Mon-Fri, 6pm – 10pm

Sat-Sun, 12pm – 4pm

5.123 For modelling purposes, it is assumed that 65% of the total weekly usage occurs at the busiest (peak) time periods. Based on research with health and fitness operators it has been assumed that the average member/user visits the facility 2.4 times per week.

5.124 Sport England's Active People Survey has been used to understand the percentage of the population participating in gym. In Dudley the once a week participation based on Active Places 8 to April 2014 shows that 6.4% of the population currently participate in gym on a weekly basis. This figure has been used to reflect the local situation, based on APS data.

Table 5.11: Health and Fitness Assessment

Standard	Value	Total
Dudley adult population (over 16)		237,294
% of population participating in health and fitness	6.4%	15,186
Average number of visits per week	2.4	36,448
No. of visits in peak time	65%	24,784
No. of visits on one hour of peak time	28	885
TOTAL NO. OF STATIONS REQUIRED (PEAK TIME)		885

5.125 This shows that, on this basis, a total of 885 stations are required during the peak time period to accommodate anticipated current levels of demand. According to Active Places the current supply is 1,811 stations in total or 1,388 stations which are available as pay and play. This represents an oversupply of 553 stations if assessed only on the basis of pay and play and 926 stations if assessed on the total supply of stations.

5.126 It is challenging to consider if this FIA assessment does reflect the Dudley situation as 18 of the total 34 venues are provided by the commercial sector and if there was such a large over supply of venues/fitness stations then the number of commercial venues would reflect this and be lower.

5.127 Certainly the FIS assessment method suggests most strongly there is no need for additional health and fitness provision in Dudley. The performance of the current centres would appear to reflect these difficult market conditions.

Quality

5.128 Information on the quality of facilities in Dudley is taken from Active Places, which sets out the age of facility, and refurbishment, and enables this aspect to be used as a proxy for quality. Table 5.12 overleaf sets out the decade in which the health and fitness venues opened and the decade of any refurbishment.

5.129 As the table shows the stock is quite recent with 70% of the venues opening post 2000. Only 4 venues (11%) opened prior to 1990. Of the refurbished venues, 13 out of the total 14 venues which opened prior to 2000 have been refurbished and 9 of the 16 venues which opened in the 2000 decade have been refurbished.

5.130 Overall and as might be anticipated with health and fitness venues, the stock is quite recent in its age of opening and has been extensively maintained.

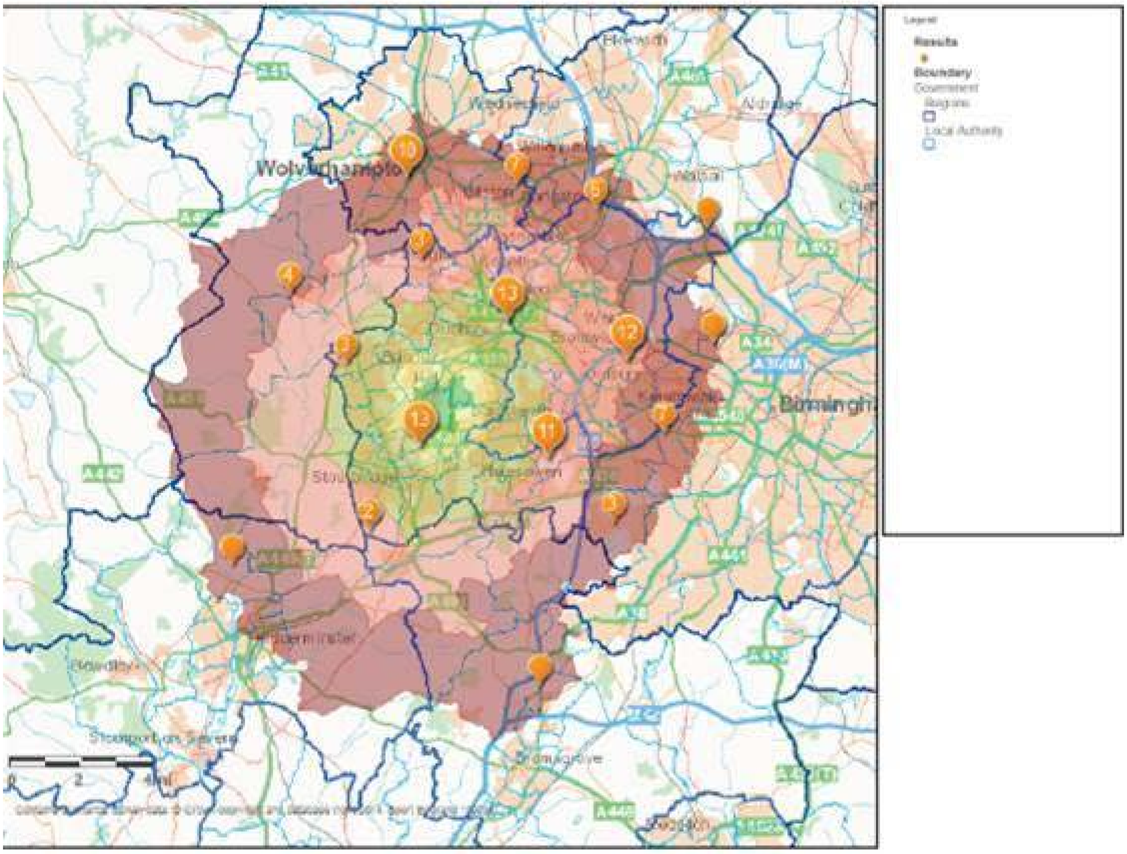
Table 5.12: Decade of opening and modernisation of health and fitness venues in Dudley 1970 - Present

Decade centre opened	1970's	1980's	1990's	2000	Post 2010
No of centres	2	2	10	16	4
No of centre modernised by decade of opening	2	2	9	9	0

Accessibility

5.131 Accessibility mapping is not available from Active Places and the high number of venues means it is difficult to plot the location of all 34 venues in Dudley. However as reported under the quantity heading and taking the Brierley Hill Pure Gym venue based on its central location in the borough there are a further 18 venues which are accessible based on a 20 minute drive time of this venue. So overall accessibility to a large number of venues by car travel catchments is good. Map 5.10 on the access to venues based on the Brierley Hill location is set out below.

Map 5.10: Location of health and fitness centres in within a 20 minute drive time of the Pure Gym at Brierley Hill



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Summary of findings for Health and Fitness

There are 34 health and fitness venues in Dudley providing a total of 1,811 health and fitness stations across the borough. Of these 22 are available on a pay and play basis, 4 are for registered members and 8 are for a combination of membership of either a sports club or community organisation.

Pay and play is the most prominent access type with 1,388 stations, some 76.6% of the total number of stations. Some 17.1% of the total stations are for registered membership use and the remaining 102 stations (6.3%) are for private or community association use. So the effective number of 'public' stations in the borough is 1,388 stations.

Based on the benchmark measure of stations per 1,000 population, Dudley and Birmingham, have the lowest provision. In Dudley it is 0.57 stations per 1,000 populations and 0.56 stations in Birmingham.

Sandwell has 2,093 stations and based the measure of stations per 1,000 population it has the highest provision at 0.66 stations.

The Active People survey for health and fitness categorises health and fitness as gym activities. Given its popularity there are sufficient respondents to be able to set out the rate of once a week participation in gym at the Dudley, Black Country and West Midlands Region level for the Active People surveys 2006 - 2014.

The rate of once a week gym participation in Dudley has fluctuated considerably over the course of the Active People surveys. It being the same as the Black Country rate at 7.2% of the adult population doing gym at least once a week in October 2006.

Between then and October 2014 the Dudley rate has fluctuated between 8.1% of adults doing gym in October 2009, to then fall to 5.8% of adults the following year. It then increases to 8.7% of the adult population in October 2012, to then fall to 6.4% of all adults doing gym in October 2013 and back to 8.5% by April 2014.

The Black Country rate has not fluctuated so dramatically and has shown a steady increase from its low of 6% of adults doing gym once a month in October 2008 to 8.5% of all adults in April 2014.

The West Midlands rate has hardly changed from 8.6% of all adults doing gym at least once a week in October 2006 to 8.5% in April 2014.

The reasons for the volatility of the Dudley rate are hard to explain, especially given the very high percentage at 76% of the total number of stations being pay and play. So the opportunity to do gym without taking out a membership would not appear to be a barrier or constraint to participation.

A most likely explanation is the sample size of respondents to the Active People survey. At the Dudley level the number of respondents to questions about gym will be very small but it will be larger at the Black Country and much larger at the West Midlands level. The bigger areas could therefore have a larger number of respondents to actual gym participation and this shows that participation does not fluctuate – much. At the Dudley level with far fewer respondents it could present a picture of wide variation in gym participation.

The Sport England tools of Active Places or the facility planning model do not consider health and fitness in the same degree of detail as other facilities, and there is no 'ready reckoner' for assessing demand. The Fitness Industry Association has devised a model that provides guidance on the supply of stations against the current anticipated demand.

The model defines health and fitness users as all people participating in health and fitness, including private club members and users of local authority facilities. The model is based on peak period demand, and the peak times. The FIA for modelling purposes, assumes that 65% of the total weekly usage occurs at the busiest (peak) time periods. Based on research with health and fitness operators it has been assumed that the average member/user visits the facility 2.4 times per week.

Sport England's Active People Survey has been used to understand the percentage of the population participating in gym. In Dudley the once a week participation based on Active Places 8 to October 2013 shows that 6.4% of the adult population currently participate in gym on a weekly basis. This figure has been used in the FIA modelling assessment.

The assessment shows a total of 885 stations are required during the peak time period to accommodate anticipated current levels of demand. According to Active Places the current supply is 1,811 stations in total or 1,388 stations which are available as pay and play. This represents an oversupply of 553 stations if assessed only on the basis of pay and play and 926 stations if assessed on the total supply of stations.

It is challenging to consider if this FIA assessment does reflect the Dudley situation as 18 of the total 34 venues are provided by the commercial sector and if there was such a large over supply of venues/fitness stations then the number of commercial venues would reflect this and be lower.

Certainly the FIS assessment method suggests most strongly there is no need for additional health and fitness provision in Dudley. The performance of the current centres would appear to reflect these difficult market conditions.

In terms of quality of facilities in Dudley and taken from Active Places, it shows the stock is quite recent with 70% of the venues opening post 2000. Only 4 venues (11%) opened prior to 1990. Of the refurbished venues, 13 out of the total 14 venues which opened prior to 2000 have been refurbished and 9 of the 16 venues which opened in the 2000 decade have been refurbished.

Overall and as might be anticipated with health and fitness venues, the stock is quite recent in age of opening and has been extensively maintained.

Overall summary of findings and way forward

There is a good modern supply of health and fitness facilities across Dudley. The market is competitive as demonstrated by the performance of the Council facilities. Any additional provision over and above the current supply should be cautioned against and should only be developed following a robust business case.

Health and fitness provision is however a key element of delivering sustainability for any leisure centre, and would be an important consideration for any operator. Should the Council pursue a redevelopment or new provision strategy the levels of health and fitness provision should seek to replicate existing levels of provision (but high quality and purpose built) and any development over and above existing levels should be considered as part of a full business case.

Studios

Quantity - supply

5.132 The Active Places Power database has recently collected information on studio provision mostly as part of wider sports facilities. There are 34 studios available at present in Dudley at 34 locations. So there are no venues which has more than one dance studio.

5.133 The 34 venues is the same total as for health and fitness venues and many are at the same venue. However there are also 14 venues in secondary schools and further education colleges. Some 15 venues are commercially owned and most of these are at health and fitness centres. Whilst there are 5 local authority dance studio venues.

5.134 Some 16 venues are pay and play venues, 9 are for use by members as a commercial venue and the remaining 9 venues are for use by membership of a sports club or community organisation.

5.135 Table 5.13 overleaf is a list of al 34 dance studio venues in Dudley in 2014.

5.136 It is possilbe that the dance studio information is not as comprehensive as the data sets for other facity types , given it has only recently been addedd ot the Active Places power database and supply information started to be collected. it is unlikely to be sufficiently robust to inform a full needs assessment.

Table 5.13: List of all dance studios in Dudley 2014

Site Name	Facility Type	Facility Status	Access Type	Ownership Type	Management Type	Year Built	Year Refurb
ABSOLUTE FITNESS	Studio	Operational	Registered Membership use	Commercial	Commercial Management	1997	2004
BODYWISE HEALTH CLUB	Studio	Operational	Registered Membership use	Commercial	Commercial Management	2007	n/a
CASTLE HIGH SCHOOL	Studio	Operational	Private Use	Voluntary Aided School	School/College/University (in house)	2005	n/a
COSELEY LEISURE CENTRE	Studio	Operational	Sports Club / Community Association	Community school	School/College/University (in house)	2004	n/a
CRYSTAL LEISURE CENTRE	Studio	Operational	Pay and Play	Local Authority	Local Authority (in house)	1990	2008
DAVID LLOYD CLUB (DUDLEY)	Studio	Operational	Registered Membership use	Commercial	Commercial Management	2001	2013
FITNESS FACTORY	Studio	Operational	Pay and Play	Commercial	Commercial Management	1995	2000
FITNESS4LESS (BRIERLEY HILL)	Studio	Operational	Pay and Play	Commercial	Commercial Management	2000	2013
FORTNOCKS HEALTH CLUB	Studio	Operational	Pay and Play	Commercial	Commercial Management	1992	2000
GYM 212	Studio	Operational	Pay and Play	Commercial	Commercial Management	2000	n/a
HALESOWEN COLLEGE SCHOOL	Studio	Operational	Sports Club / Community Association	Further Education	School/College/University (in house)	2003	n/a
HALESOWEN COLLEGE SCHOOL	Studio	Operational	Sports Club / Community Association	Further Education	School/College/University (in house)	2003	n/a
HALESOWEN LEISURE CENTRE	Studio	Operational	Pay and Play	Local Authority	Local Authority (in house)	2006	n/a
HALESOWEN LEISURE CENTRE	Studio	Operational	Pay and Play	Local Authority	Local Authority (in house)	2008	n/a
HALESOWEN LEISURE CENTRE	Studio	Operational	Pay and Play	Local Authority	Local Authority (in house)	2008	n/a
HILLCREST COMMUNITY LEISURE CENTRE	Studio	Operational	Pay and Play	Community school	Local Authority (in house)	2007	n/a
HILLCREST COMMUNITY	Studio	Operational	Pay and Play	Community	Local Authority (in house)	2007	n/a

Site Name	Facility Type	Facility Status	Access Type	Ownership Type	Management Type	Year Built	Year Refurb
LEISURE CENTRE				school			
KLASSICS HEALTH AND LEISURE	Studio	Operational	Registered Membership use	Commercial	Commercial Management	1997	2006
LE CLUB MERRY HILL DUDLEY	Studio	Operational	Registered Membership use	Commercial	Commercial Management	2002	n/a
LEASOWES SPORT CENTRE	Studio	Operational	Sports Club / Community Association	Community school	School/College/University (in house)	1992	n/a
PENSNETT EDUCATION CAMPUS	Studio	Operational	Pay and Play	Local Authority	Local Authority (in house)	n/a	n/a
PURE GYM (BRIERLEY HILL)	Studio	Operational	Registered Membership use	Commercial	Commercial Management	2002	2008
RIDGEWOOD HIGH SCHOOL	Studio	Operational	Private Use	Foundation School	School/College/University (in house)	2007	n/a
THE DORMSTON CENTRE	Studio	Operational	Pay and Play	Community school	Local Authority (in house)	2000	n/a
THE ELLOWES HALL SPORTS COLLEGE	Studio	Operational	Pay and Play	Foundation School	School/College/University (in house)	1997	n/a
THE ELLOWES HALL SPORTS COLLEGE	Studio	Operational	Pay and Play	Foundation School	School/College/University (in house)	n/a	n/a
THE FITNESS EMPORIUM	Studio	Operational	Pay and Play	Commercial	Commercial Management	2002	n/a
THE HIGH ARCAL SCHOOL	Studio	Operational	Sports Club / Community Association	Foundation School	School/College/University (in house)	1999	n/a
THORNS COMMUNITY COLLEGE	Studio	Operational	Pay and Play	Community school	School/College/University (in house)	2005	n/a
VELOCITY HEALTH & FITNESS (BIRMINGHAM DUDLEY)	Studio	Operational	Registered Membership use	Commercial	Commercial Management	2000	n/a
VELOCITY HEALTH & FITNESS (BIRMINGHAM DUDLEY)	Studio	Operational	Registered Membership use	Commercial	Commercial Management	2000	n/a
VELOCITY HEALTH & FITNESS (BIRMINGHAM DUDLEY)	Studio	Operational	Registered Membership use	Commercial	Commercial Management	2004	n/a
WINDSOR HIGH SCHOOL	Studio	Operational	Private Use	Foundation	School/College/University	2004	n/a

Site Name	Facility Type	Facility Status	Access Type	Ownership Type	Management Type	Year Built	Year Refurb
AND SIXTH FORM				School	(in house)		
WORKOUTZ HEALTH AND FITNESS	Studio	Operational	Pay and Play	Commercial	Commercial Management	2010	n/a

Dance studios per 1,000 population

5.137 A manual calculation of the pro rata provision of dance studios in Dudley and the neighbouring local authorities is set out in Table 5.14 below. This includes all facilities on the database that are currently in operation/under construction, including private facilities):

Table 5.14: Dance studio venues per 1,000 population in Dudley and neighbouring authorities (including Birmingham)

	Population 2014	Number of dance studio venues	Stations per 1,000 population
Dudley	316,815	34	0.010
Bromsgrove	95,225	8	0.0084
Sandwell	317022	32	0.010
Wolverhampton	252928	26	0.010
Birmingham	1103398	94	0.008

5.138 Local provision based on this benchmark measure of dance studios per 1,000 population is not that informative given the very close range in the Black County authorities. However what is of note is the very similar number of actual dance studios in the authorities ranging from 26 in Wolverhampton, 32 in Sandwell and 34 in Dudley.

Quantity - demand

5.139 The Active People data on participation is available for a number of related activities that take place in studios – movement and dance, and aerobics. Movement and dance participation has fluctuated wildly over the period of the APS outputs, and currently stands at about 0.37 nationally and 0.23% for the West Midlands region.

5.140 Chart 5.12 overleaf shows the rate of once a-week participation at both the West Midlands Region and England wide level over the AP surveys. It is very low and within a range of 0.35% - 0.5% of the adult population doing movement and dance at least once a week. Hence the reason why there is no data at the Dudley or Black Country level. Participation is so low that there are not enough respondents to the AP survey for movement and dance to generate a reliable participation rate at these geographic levels.

5.141 The West Midlands rate (amber line) and the England rate (blue line) have tracked one another over the 2006 – 2012 period at between 0.35% - 0.55% of the adult population participating at least once a week.

5.142 However the West Midlands rate has declined since 2011 and is now 0. 23% of the adult population participating at least once a week in April 2014. The England wide rate is slightly higher at 0.37% of the adult population participating in movement and dance at least once a week.

Chart 5.12: Active People once a week participation in movement and dance for West Midlands Region and England wide 2006 – 2014

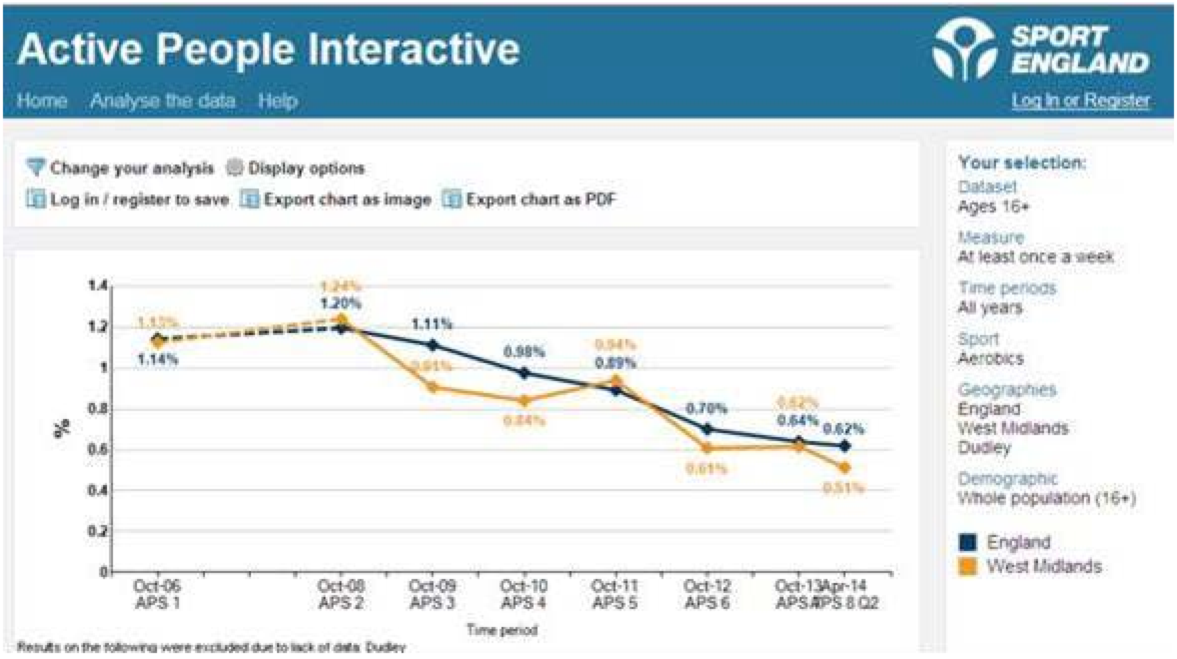
5.143 Taking the APS 8 October 2013 – April 2014 West Midlands rate of 0.23% of the region's adults participating in movement and dance and applying it to Dudley adult population then there are j545 adults participating at least once a week in 2014. This is based on 0.23% of the Dudley adult population in 2014 of 237,294 people.

Demand - aerobics

5.144 Aerobic classes is also a function of the use of studios and the once a week participation rate for aerobics for adults at the West Midlands Region and England wide level is set out in Chart 5.13 overleaf. For the same reasons as for movement and dance the rate for Dudley is not generated.

5.145 As Chart 5.13 shows the rate of participation in aerobics has followed a similar line of decline at both geographies since 2008. By APS 8 in October 2013 – April 2014 the national rate of participation is 0.62% and the West Midlands rate is 0.51% of adults doing aerobics at least once a week.

Chart 5.13: Active People once a week participation in aerobics for West Midlands Region and England wide 2006 – 2014



5.146 Taking the APS 8 October 2013 – April 2014 West Midlands rate of 0.51% of the region's adults participating in aerobics and applying it to Dudley adult population then there are just 1,210 adults participating at least once a week in 2014. This is based on 0.51% of the Dudley adult population in 2014 of 237,294 people.

Market segmentation

5.147 The market segmentation map for participation in gym <u>does include</u> aerobics yoga and fitness classes as well as individual gym activities. Also market segmentation participation is based on measuring at least <u>once a month</u> participation. Whereas the Active People benchmark data and charts used in the report is based on at least once a-week participation.

5.148 Given participation in gym is much much higher than dance exercise or aerobics then it would be very misleading to focus on the market segmentation findings for this overall category of gym, aerobics, yoga and fitness classes as the vast majority of the participation would measure gym not the main activities of dance studios of aerobics, fitness classes or movement and dance. However dance exercise is a category which market segmentation does measure.

5.149 In short, it is possible to present the market segmentation findings for dance exercise separately but NOT for aerobics.

5.150 The market segmentation maps for people who DO play and would LIKE TO do dance exercise t for Dudley is set out Maps 5.11 and 5.12 overleaf.

5.151 Map 5.11 shows that for all of the Dudley area and in all of the surrounding areas the at least once a month participation rate in dance exercise is between 0.1% - 1% of the Dudley adult population. This compares with Active People survey findings of 0.23% of the

West Midlands (findings for Dudley are not available) doing movement and dance at least once a week in October 2013.

Map 5.11: Percentage of the Dudley population who DO dance exercise

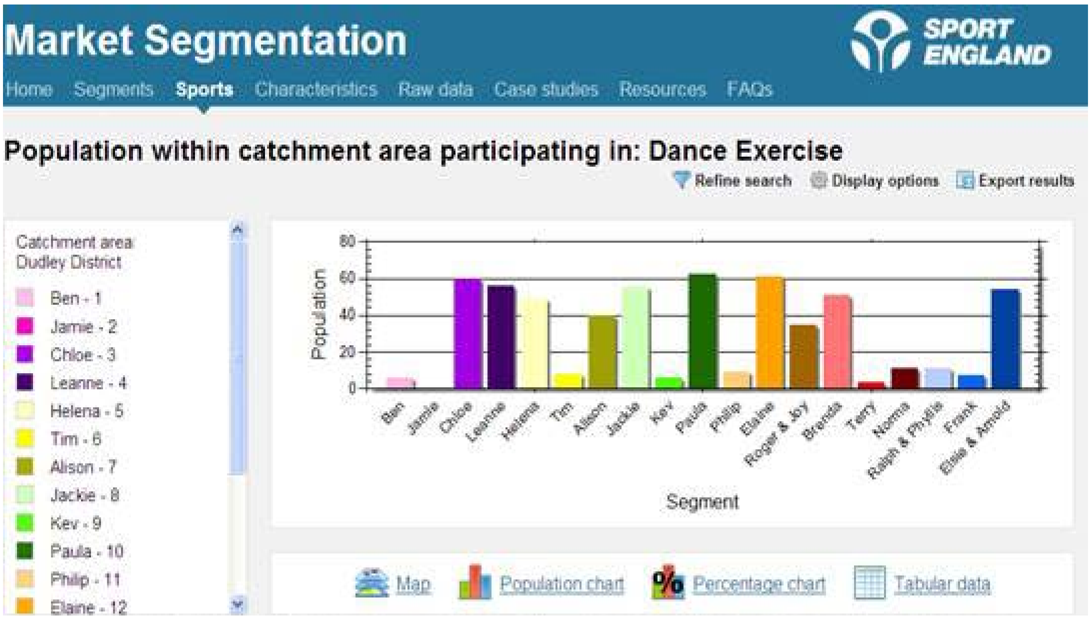
5.152 The market segmentation data and map for the number of people who would like to do dance exercise at least once a month in Dudley is set out in Map 5.12 below. This shows the latent demand is the same as the actual demand of between 0.1% - 1% of the Dudley adult population and with the same latent demand rate for the surrounding area.

Map 5.12: Percentage of the Dudley population who WOULD LIKE TO DO dance exercise

5.153 In terms of the profile of people who do and would like to do dance exercise across the 19 market segments and the total number in each segment this is shown in Charts 5.14 and 5.15 below.

5.154 In terms of the segments who do dance exercise this has a broad based appeal across both all ages from 16 - 45 but also in the Elsie and Arnold segment which is 66+. It is very much focused in 9 female segments and there are no male segments with high dance exercise participation. Overall number of participants is low with 4 of the top 8 segments having around 60 participants.

Chart 5.14: Market segment population totals for DO dance exercise activities in Dudley



5.155 For the would like to do dance exercise in Chart 5.15 below the Dudley profile is similar in its spread is across the same range of 8 female market segments in the 16 – 45 age range but with much lower numbers. And 5 segments in the 40 participant range.

Chart 5.15: Market segment population totals for WOULD LIKE TO do dance exercise activities in Dudley

5.156 It is not possible to develop the total market segment population for dance studios because the market segment data for aerobics is not provided, only for dance exercise. Based on the dance exercise market segmentation population alone and across ALL market segments for that do dance exercise at least once a month it is 584 participants. For people who would like to do dance exercise it is 460 adult who would like to participate at least once a month. This provides a total market segmentation participation of 1,044 people. This represents some 0.43% of the adult population in Dudley in 2014.

5.157 This percentage compares favourably with the West Midlands rate of ONCE a WEEK participation in movement and dance of 0.23% of the regional population and the West Midlands once a week participation of 0.515 of the regional adult population doing aerobics.

Other methods of determining demand

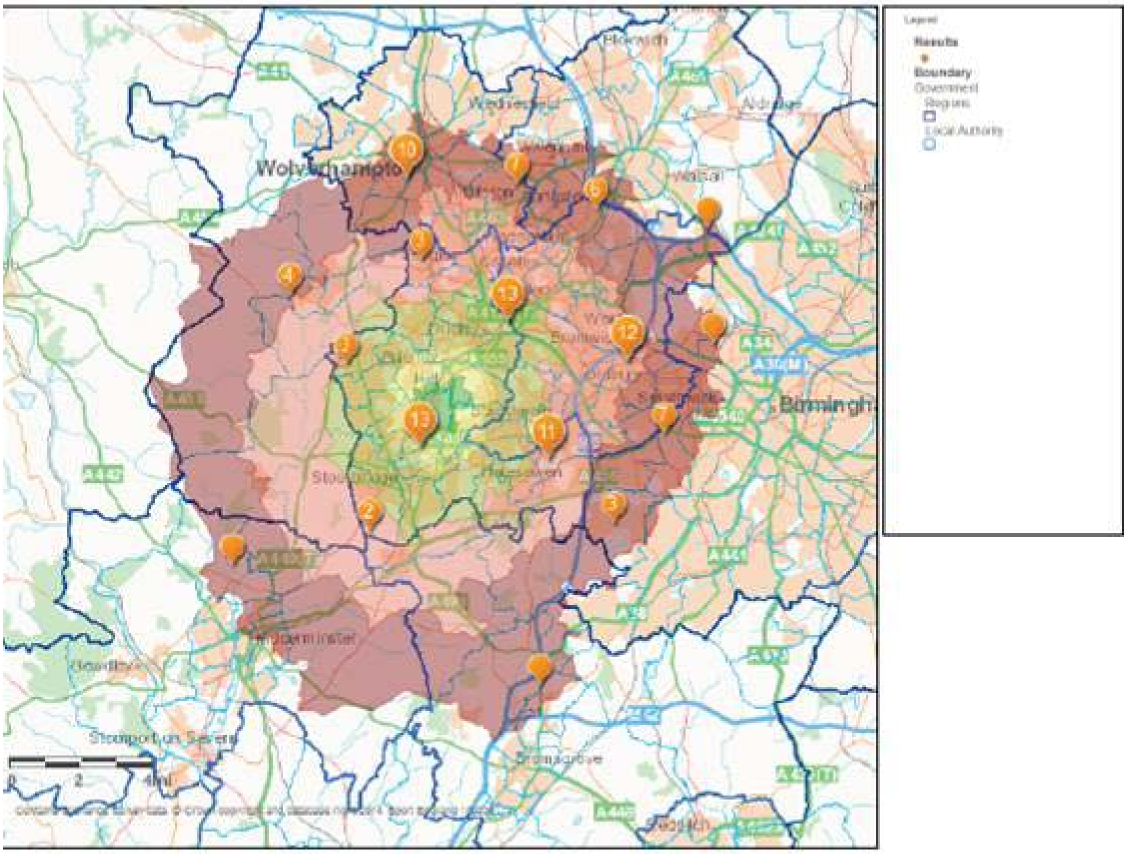
5.158 There is no accepted method of assessing demand for studio use, and as already set out there is no participation daya from Active People at the Dudley borough level. Additional evidence of local usage of and demand for such facilities is required to assess whether current supply meets likely current and future demand.

Accessibility

5.159 The location of studios which are within a 20 minute drive time catchment of the Fitness4less at Brierley Hill is set out in Map 5.13 overleaf. As for health and fitness this venue is selected because of its central location in Dudley. The map shows there are 15 other studios within a 20 minute drive time of this venue. (Note the numbers refer to a listing of the venues by number but the details of each venue are not available as an attachment to the map).

5.160 This suggests that over half of the Dudley supply of studios are accessible based on a 20 minute drive time of this central location.

Map 5.13: Location of studios within a 20 minute drive time of the Fitness4less studio at Brierley Hill



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Summary of findings for studios

There are 34 studios in Dudley at 34 locations. So there are no venues which has more than one dance studio.The 34 venue total is the same total as for health and fitness venues and many studios are at the samevenue. However there are also 14 dance studios in secondary schools and further education colleges. Some 15 venues are commercially owned and most of these are at health and fitness centres. Whilst there are 5 local authority dance studio venues.

Some 16 venues are pay and play venues, 9 are for use by members at a commercial centres venue and the remaining 9 venues are for use by membership of a sports club or community organisation.

There is vuirtually no difference in the provision based on this benchmark measure of dance studios per 1,000 population across the authorities. What is of note is the similar number of actual dance studios in the authorities ranging from 26 in Wolverhampton, 32 in Sandwell and 34 in Dudley.

Active People data on participation is available for a number of related activities that take place in studios – it includes movement and dance, and aerobics. Movement and dance participation has fluctuated wildly over the period of the APS outputs, and currently stands at about 0.37 nationally and 0.23% for the West Midlands region.

Aerobic classes is also a function of the use of studios. The once a week participation rate for aerobics for adults at the West Midlands Region and England wide level has followed a similar line of decline at both geographies since 2008. By APS 8 in October 2013 – April 2014 the national rate of participation is 0.62% and the West Midlands rate is 0.51% of adults doing aerobics at least once a week. Data for the Black Country or for Dudley is not available.

Taking the APS 8 October 2013 – April 2014 West Midlands rate of 0.23% of the region's adults participating in movement and dance and applying it to Dudley adult population then there are just 545 adults participating at least once a week in 2014. This is based on 0.23% of the Dudley adult population in 2014 of 237,294 people.

Appling the same approach to aerobics and taking the APS 8 October 2013 – April 2014 West Midlands rate of 0.51% of the region's adults participating in aerobics, this shows there are 1,210 adults participating at least once a week in 2014.

Combined the two activities of movement and dance and aerobics generate a once a week participation total of 1,755 people participating. Combined this represents 0.71% of the Dudley adult population. It is not possible to identify how much of this participation takes place in the 34 studios in Dudley. Also studios will provide for activities other than these ones, for example spinning classes. What it does show w is low and probable underestimate of demand and participation in activities that take place in studios.

In terms of accessing studios the venues within a 20 minute drive time catchment of the Fitness4less at Brierley Hill are assessed (Note: this venue is selected because of its central location in Dudley.) There are 15 other studios within a 20 minute drive time of this venue.

This suggests that over half of the Dudley supply of studios are accessible based on a 20 minute drive time of this central location.

Overall summary of findings and way forward

Flexible studio space for classes and more general physical activity session will become an increasingly important part of the provision picture as participation trends change. This assessment is more of a position statement and in terms of assessing future provision for studios this is best developed as part of the core business case for new provision/replacement of an existing sports hall or swimming pool, which should seek to incorporate flexible small hall / studio space as appropriate.

All weather athletic tracks

Supply - quantity

5.161 As there is only one all-weather athletic track in Dudley at the Dell Stadium the assessment also includes tracks across the Black Country. The assessment also includes cinder tracks in the audit.

5.162 In terms of the supply there are:

- 5 all-weather surface tracks in the Black Country of which three are 8-lane and two are 6 lane. The 8 lane tracks are at The Dell Stadium in Dudley; Hadley Stadium in Sandwell and Tipton Sports Academy also in Sandwell. The 6 lane tracks are Aldersley Leisure Village in Wolverhampton and the University of Wolverhampton at the University's Walsall site;

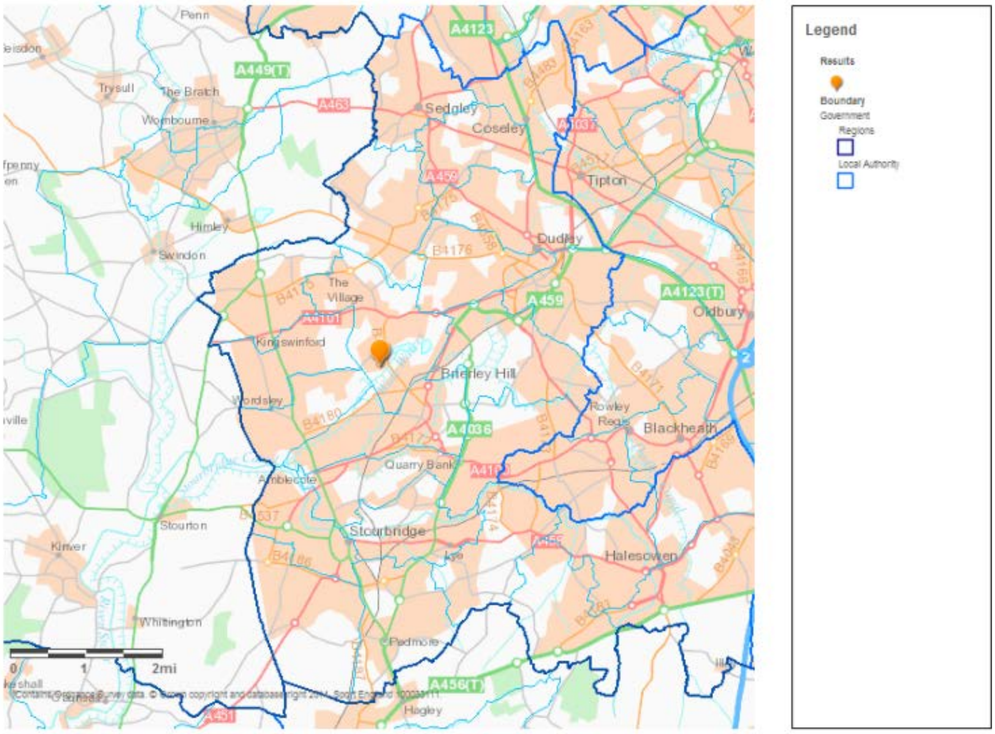
- 3 cinder tracks of 8 lanes at St Edmunds Academy in Wolverhampton; a 6 lane track at Phoenix Collegiate in Sandwell and a 4 lane track at The Kings CE School also in Wolverhampton;

- 5 of the tracks operate on a pay and play basis, with the other three operating on a club membership basis; and

- 4 of the tracks are owned by the local authority, with 3 owned by schools or colleges and one owned by the University of Wolverhampton.

5.163 The location of the Dell Academy stadium is shown in Map 5.14 below.

Map 5.14: Location of the Dell Academy Dudley 2014



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5.164 In terms of the details of the all-weather and cinder tracks this is set out in Table 5.15 overleaf.

Table 5.15: Athletic Tracks in the Black Country 2014.

Site Name	Facility Type	No of Lanes	Facility Status	Access Type	Ownership Type	Management Type	Year Built	Year Refurb	LA Name
ALDERSLEY LEISURE VILLAGE	Synthetic	6	Operational	Pay and Play	Local Authority	Local Authority (in house)	1956	2005	Wolverhampton
HADLEY STADIUM	Synthetic	8	Operational	Pay and Play	Local Authority	Trust	1984	n/a	Sandwell
PHOENIX COLLEGIATE (SOUTH CAMPUS)	Cinder	6	Operational	Sports Club / Community Association	Community school	School/College/University (in house)	1960	n/a	Sandwell
ST. EDMUND'S CATHOLIC ACADEMY	Cinder	8	Operational	Sports Club / Community Association	Academies	School/College/University (in house)	1989	2013	Wolverhampton
THE DELL STADIUM	Synthetic	8	Operational	Pay and Play	Local Authority	Local Authority (in house)	1987	n/a	Dudley
THE KING'S C.E. SCHOOL: A SPECIALIST VISUAL ARTS & SPORTS COLLEGE WITH SCIENCE	Cinder	4	Operational	Private Use	Voluntary Aided School	School/College/University (in house)	1952	2012	Wolverhampton
TIPTON SPORTS ACADEMY	Synthetic	8	Operational	Pay and Play	Local Authority	Trust	1998	n/a	Sandwell
UNIVERSITY OF WOLVERHAMPTON (WALSALL SITE)	Synthetic	6	Operational	Pay and Play	Higher Education Institutions	School/College/University (in house)	2004	n/a	Walsall

Athletic tracks per 1,000 population

5.165 Given only Sandwell is the only authority with 2 all-weather tracks an assessment of tracks per 1,000 population is not informative.

Quantity - Demand

5.166 As with the other facility types an assessment of the demand for athletics – track and field can be made by setting out the rate of participation in track and field athletics as measured in the Sport England Active People survey and applying the benchmark measure of once a week participation of at least 30 minutes moderate intensity activity.

5.167 Yet again as with other facility types data on participation in athletics is s restricted to West Midlands level and the Black Country Sports Partnership. At the Dudley Borough level there is insufficient number of respondents to the AP survey for athletics to establish a measured assessment of participation. This in itself does illustrate the low rate of participation in athletics.

5.168 Participation has increased steadily at the West Midlands level. In 2006 some 2.5% of Adults participated at least once a week in track and field and by 2014 this has increased to 4.3% of the adult population.

5.169 The Black Country participation (amber line) has fluctuated from 1.7% of the adult population doing athletics at least once a week in 2006, to 3.6% in 2010 and then to 2.3% in 2014.

Chart 5.16: Rate of participation in athletics for West Midland Region and the Black Country 2006 – 2014

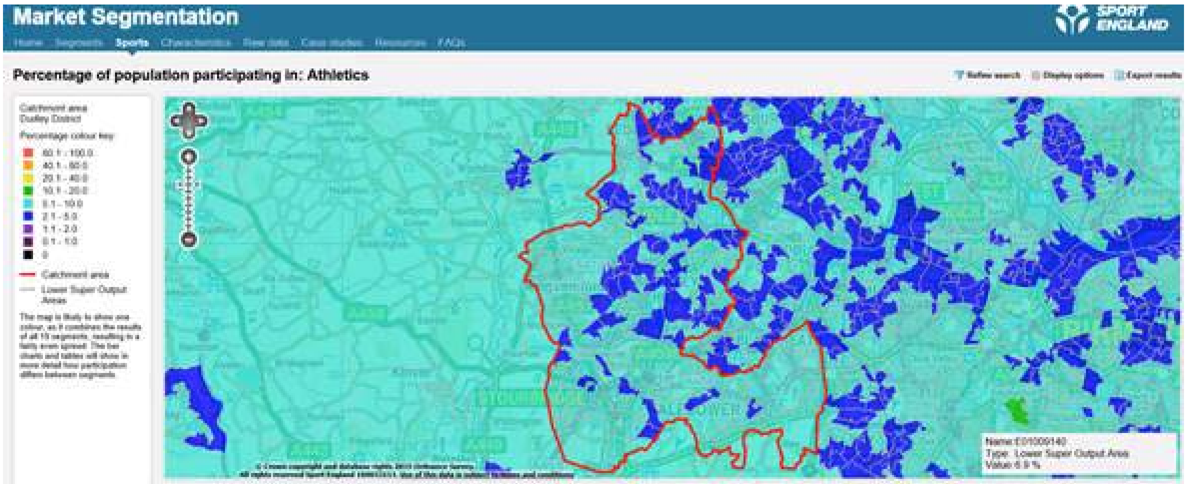
Market Segmentation

5.170 The market segmentation map for participation in athletics and would like to do athletics is set out Maps 5.15 and 5.16 overleaf.

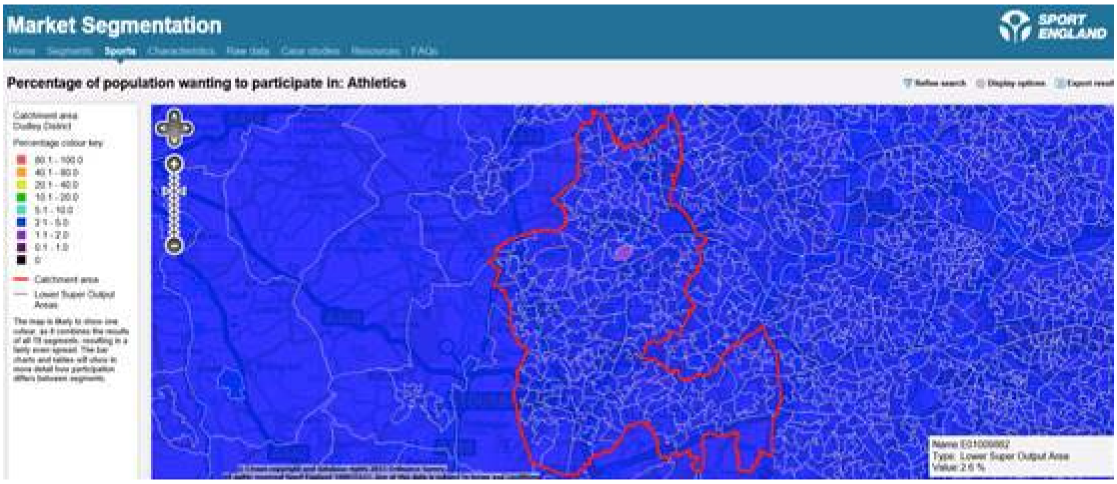
5.171 Map 5.15 shows that over half of Dudley's output areas are shaded green. The rate of participation in in these areas is between 5.1 – 10% of the adult population of Dudley doing athletics at least once a month. Whilst in the smaller number of output areas shaded blue the rate of participation is between 2.1% - 5% of the adult population in Dudley.

5.172 Map 5.16 shows the percentage of the adult population who would like to do athletics. This shows a near universal between 2.1% - 5% of the Dudley adult population who would like to do athletics at least once a month. This amounts to:

Map 5.15: Percentage of the Dudley population who DO athletics 2014

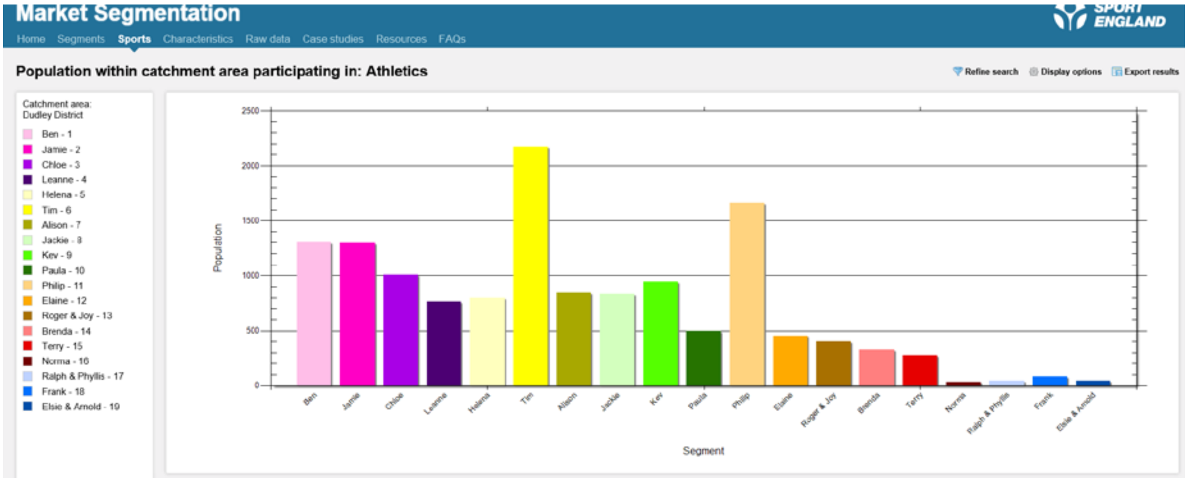


Map 5.16: Percentage of the Dudley population who WOULD LIKE to DO athletics



5.173 In terms of the profile of athletics across the 19 market segments and the total number in each segment this is shown in Chart 5.17 overleaf.

Chart 5.17: Market segment population totals for athletics in Dudley 2014



5.174 As the chart shows participation is very much focused in the market segments from Ben (pink) and Jamie (cerise, Tim (yellow) and Philip (beige).There is lower level participation in the segments from Chloe (maroon) to Kev (lime green). Athletics participation is very much male focused at over 70% of the total and not surprisingly in the 16 – 25 age range.

5.175 The total population based on those do athletics once a month (Note the Active People measures participation by once a week) is 13,770 people and it is 6,355 for those who would like to do athletics.

Demand assessment for athletics in Dudley

5.176 Both Sport England in its design guidance and England Athletics in its facilities strategy do not specify any needs assessments methodology, provision standards, population thresholds or catchment areas for all weather athletic tracks.

5.177 In terms of initial provision the focus is very much based on identifying the potential for athlete development and the gaps in opportunities for athletes to train. Are there any actual clubs or potential to develop clubs, what is the profile of athletics participation in schools? This ground swell forms the basis for identifying the potential demand and can be compared to existing supply, distances athletes travel and the scope to develop a track facility.

5.178 The Dudley and Stourbridge Athletics club based at the Dell Stadium has over 270 members aged between 9 and 70. This includes road runners and cross country as well as track and field. The focus is not on additional provision of tracks in Dudley, it is much more on maintaining the quality of the existing facility to keep the venue viable and the club membership increasing. A new clubhouse and changing accommodation was added in 2000 by the Council.

Quality

5.179 There is no measure of quality for synthetic athletic tracks but the predominate quality features are the track surface, the quality of the equipment, suitable changing accommodation, clubhouse and pa systems for any events.

5.180 Details of the five synthetic tracks age and year of any modernisation are set out in Table 5.16 below. The oldest track is at Aldersley Sports Village which opened in 1956 presumably as a cinder track and became a synthetic track in 2005.

5.181 Of the four other tracks only the Dell stadium is recorded as being modernised, with the new clubhouse and changing accommodation in 2000. The track was also resurfaced recently and is therefore considered to be in good condition. Of the three other tracks opened between 1984 – 2004 there is no record of any modernisation. This is hard to believe that there has not been a track re-surface in this time. If it is correct however, then the age of the tracks and the track quality makes them all very old facilities. This will limit the granting of permits for hosting events and may act as a barrier to participation.

Table 5.16: Date of synthetic track opening and year of any modernisation

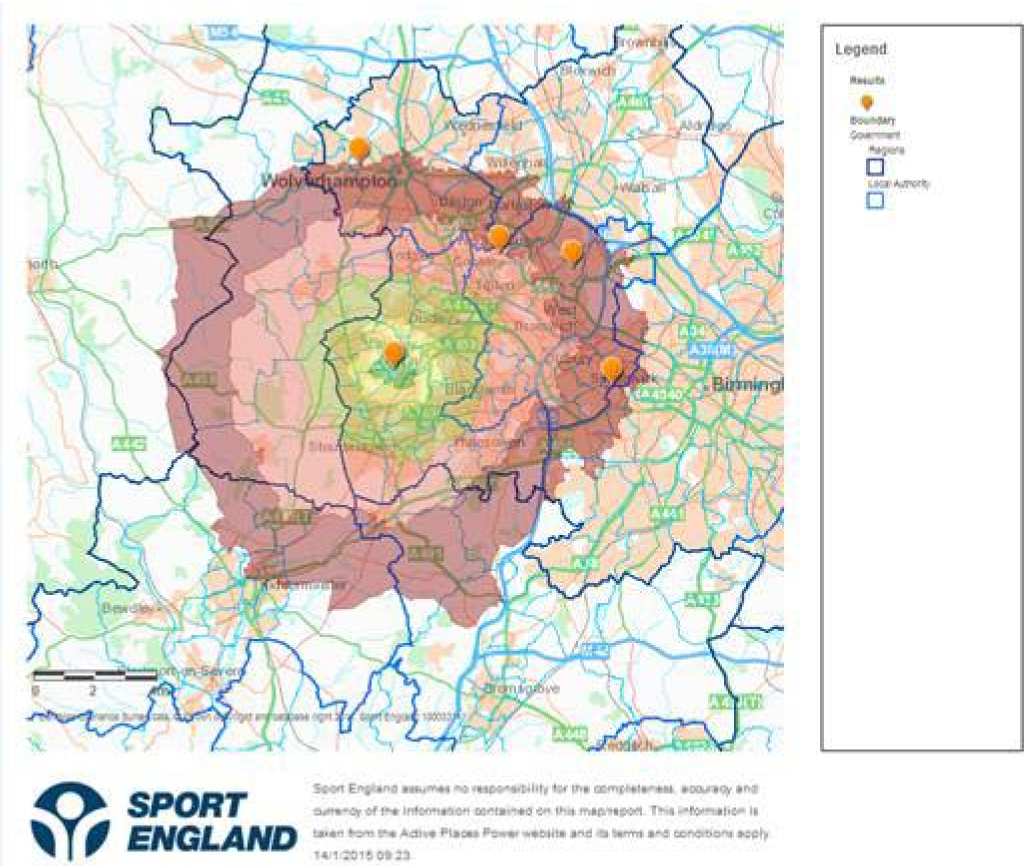
Name of track	Date opened	Modernisation
Dell Stadium	1985	2000
Aldersley Leisure Village	1956	2005
Hadley stadium	1984	No details
Tipton Sports Academy	1998	No details
University of Wolverhampton (Walsall site)	2004	No details

Accessibility

5.182 Accessibility to indoor tennis centres is based on the travel times and catchment areas for athletic tracks. The tracks which are within a 20 minute drive time of the Dell Stadium track are shown in Map 5.17 overleaf.

5.183 Of note is that all the four nearest tracks are located to the north and north east of Dell Stadium. There are no tracks within a-20 minutes or even up to 30 minutes in the south or west of Dell stadium. Again lack of access and travel distances to the Dell Stadium to the south of the authority and beyond could be a barrier to participation.

Map 5.17: Location of the Dell Stadium Athletic Track and tracks within a 20 minute drive time catchment area



Availability

5.184 Availability is assessed as the amount of amount of demand for a sports facility that can be met by the supply of facilities in an area, usually a local authority area.

5.185 There is no capacity figure for an all-weather athletic track and it is more about the Dudley and Stourbridge club membership use and access for training. Plus availability for pay and use for casual activity, through the club and the Council and availability for school use.

5.186 The club has 270 members and there are no details of schools use and the track is available for pay and use activity. Given the size of the club and the availability of the track for other users then there does not appear to be any problem of availability. It is dedicated track site and with its own access.

Governing Body and other views

5.187 UK Athletics, the sport's governing body, produced Athletics Facilities Planning and Delivery 2007 – 2012 to guide facility provision up to and after the 2012 Olympics. The criteria for new projects sought to ensure a hierarchy of provision for competition and training purposes for both outdoor and indoor facilities. The firm, but not strict, criteria for the provision of outdoor facilities were:

- One outdoor synthetic track (6 or 8 lanes) per 250,000 within 20 minutes drive (45 minutes in rural areas).

5.188 More recently two additional strategies have been prepared by the NGBs for athletics, British Athletics and Athletics England.

UK Athletics (UKA) Facilities Strategy 2014-19

5.189 Success at recent events and the increase in high profile mass participation running events, are contributing to a burgeoning profile of athletics which presents a platform for the development of the sport.

5.190 Facilities are essential to attracting, retaining and developing athletes of the future. Having the right facilities in the right place will be crucial in meeting growing demand, increasing participation in physical activity and athletics, improving the health of the nation and supporting a new generation of athletes in clubs and schools through to national and world class level.

5.191 UKA and the Home Country Athletics Federations (HCAFs) recognise the challenges faced by facility owners and venue operators, and the 5 year Facility Strategy (2014-2019) uses a Track & Field facility model designed to support a sustainable UK network of development, training and competition venues that meet Home Country needs aligned to UKA's Athlete/Participant Development Model, comprising a range of facilities as follows:

- **Compact Athletics Facility** - A new generation of affordable and sustainable indoor and outdoor athletics satellite facilities that provide a stepping stone into Club Venues. Compact Athletics Facilities are designed to fit available spaces and budgets, and provide functional, inspiring, facilities at which people of all ages and abilities can improve their fitness and confidence and develop the FUNdamental athletics movement skills of run, jump and throw.

- **Club venues** - Track and field facilities (indoor and outdoor) that have a strong anchor club(s) membership 100+ and a focus on athletes at the Event Group stage of the Athlete Development Model (ADM) promoting appropriate training and competition opportunities. To support site sustainability, Club Venues should have excellent social and ancillary provision and facilities that actively encourage multi-sport usage. Club venues are suitable for low level competitions only (Level 1 – local open/medal meetings).

Regional Indoor and Outdoor Venues, National Competition Venues and High Performance Centres and International Venues

5.192 In addition to Track and Field provision, it is important to recognise the huge amount of club activity that takes place on roads, paths and trails and the strategy also maps out a plan for future "running" facilities. The strategy does not seek to identify priority facilities, clubs or geographical areas. Instead, it provides the direction and guidance that will enable the four Home Country Athletics Federations (England Athletics, Athletics Northern Ireland, Scottish Athletics and Welsh Athletics) to establish their own priorities and deliver the principles of the UKA Facilities Strategy within their own national context.

5.193 UKA does not have capital development funds to invest in facilities. However, it has a key role to play in the governance and direction of the sport and will continue to support HCAFs, Home Country Sports Councils and external funding partners to identify and prioritise capital projects that address deficiencies in provision, and contribute to the achievement of key strategic objectives.

England Athletics Strategic Facilities Plan 2012-17

5.194 Active People Survey identifies that 1.9m people over the age of 16 participate in athletics regularly with recreational runners accounting for almost half this number. There are in addition a significant number of children and young people under 16 years of age, the majority of who have become members of track and field clubs, which have shown a growth in membership in the last four years.

5.195 There are a variety of athletics disciplines, a diverse athlete profile and participation environments. Athletics is a low cost participation sport that makes it very accessible. However formal tracks are underutilised outside of club night and event usage and there is an ageing stock of facilities that normally require on-going subsidy. The growth in the sport is in recreational running that has resulted in significant new runners into the sport over the past few years and evidence strongly suggest this growth will continue.

5.196 The facility development agenda for England will work with UK Athletics on a National level and with Athletics Networks on a local level to address future competition and training needs; to engage and exploit opportunities with other sports and agencies and to deliver support and guidance to clubs, schools and communities. The priorities for investment underpin and support the activity and programme priorities delivered by Athletics Networks.

5.197 For the area of road, cross-country and fell running, whilst major facility interventions are limited, England Athletics will work with relevant agencies to promote and protect urban and country-side routes and encourage the opening up of new tracks and routes. There are clear practical benefits of creating better links between running clubs, groups and track and field venues and clubs. The provision of ‘drop-in’ points in parks and key gathering spaces in conjunction with other sports will be encouraged and some tools developed to make recreational running more enjoyable, particularly to assist new participants.

5.198 Track and field venues face increasing challenges in terms of maintaining quality facilities coupled with the increasing cost of operations. More usage of tracks, engagement and collaboration between parties is to be encouraged to maximise use of tracks in and out of athletics competition in order to meet maintenance costs and improvements. The modernization of changing and social provision is also important to help sustainability and attract new participants.

5.199 There is a need for more locally based covered training facilities, linked to formal track and field venues that could also be utilised by other sports to help viability. Full venue assessment is to be introduced for track and field venues in relation to facilities for disabled athletes and best practice guidance will be provided to assist operators in this area.

5.200 Innovative solutions are required for new ‘compact’ facility models to drive mass participation. Facilities to fit restricted spaces and multi-sport areas; integration of tracks and straights with synthetic pitch developments; mobile sprint straights to take the sport to communities and further enhancement of higher education facilities for community access.

5.201 England Athletics will establish a Community Athletics Team servicing the needs of clubs, schools and communities, delivering facility development support and working closely with UK Athletics (UKA) and other partners. It will aim to provide clubs with operational and facility development support and explore and exploit opportunities for development with existing and new partners. It will provide an information hub for athletics facilities and disseminate best practice through Athletics Networks and to its clubs. If capital funding is achieved, it will also manage a capital investment programme targeting funds to projects that will make a real difference to the sport.

5.202 The benefits to the sport of a having more direct involvement in the facility development agenda is that England Athletics will lead and drive investment to support its clubs, schools, communities and coaches in order to help underpin the sport development priorities and programmes. It will enable better and more extensive engagement with partners and maximize effort and resources. It will enable the delivery of specific expertise within its structure to better exert influence in the area of facility planning and development – an area vital for future growth and sustainability of the sport.

Overview

5.203 The two new strategies update and reiterate the following previous objectives for outdoor facilities:

- Investment into community track & field and recreational running projects to underpin and accelerate EA's community activation work.
- Focus on investment in existing facilities rather than creation of new ones (unless new facilities are entry level Compacts or a direct replacement for existing stock).
- New build entry level Compact Athletics Facilities in priority areas that support increased participation at the multi- activity/multi event stages of the UKA Athlete Development Model and provide pathways to existing clubs and club venues.
- Multi-sport focus at club venues support increased usage and sustainability.
- Sustainable business models that may include multi-sport artificial grass pitch infields and throwing areas external to the main track.
- Modern, functional ancillary provision: Warm up/multi-purpose areas, Toilets and Changing rooms, Clubrooms, refreshment areas, gym/conditioning rooms, Car Parking.
- Functional and appropriate floodlighting.

5.204 As part of the work discussions have been held with England Athletics representatives. The views are set out below:

'The Dell has a thriving athletics club operating out of the facility which is obviously a multisport use site. The challenge we have is that the subsidy that it currently receives needs to significantly reduce; my discussions were with the all partners but most interestingly the FA who want to see more facility provision in the area. I believe the way forward to safeguard the track would be to allow the infield to be developed in to an artificial surface that can be used for football but also have some field events take place.'

Summary of findings for all weather athletic tracks

There is one all-weather athletics track in Dudley at the Dell Stadium. There are 5 all-weather surface tracks in the Black Country of which three are 8-lane and two are 6 lane.

The 8 lane tracks are at The Dell Stadium; Hadley Stadium in Sandwell and Tipton Sports Academy also in Sandwell. The 6 lane tracks are Aldersley Leisure Village in Wolverhampton and the University of Wolverhampton at the University's Walsall site.

Three of the all-weather tracks operate on a pay and play basis, with the other two operating on a club membership basis.

Three tracks are owned by the local authority, including the Dell Stadium, with two owned by schools or colleges.

The Dudley and Stourbridge Athletics club is based at Dell Stadium. It has 270 members aged between 9 – 70 and this includes road runners and cross country runners as well as track and field. A new clubhouse and changing accommodation was provided by the Borough Council in 2000 and the track surface was refurbished recently.

There is no measure of quality for synthetic athletic tracks but the predominant quality features are the track surface, the quality of the equipment, suitable changing accommodation, clubhouse and pa systems for any events.

The oldest track is at Aldersley Sports Village which opened in 1956 presumably as a cinder track and became a synthetic track in 2005.

Of the four other synthetic tracks only the Dell stadium is recorded as being modernised, with the new clubhouse and changing accommodation in 2000 and the track surface was refurbished recently. Of the three other tracks opened between 1984 – 2004 there is no record of any modernisation. It is unlikely that there has not been a track re-surface in this time. If it is correct however, then the age of the tracks and the track quality makes them all very old facilities. This will limit the granting of permits for hosting events and may act as a barrier to participation.

In terms of participation and as with other facility *types,* data on participation from Active People in athletics is s restricted to West Midlands level and the Black Country Sports Partnership. At the Dudley Borough level there is insufficient number of respondents to the AP survey for athletics to establish a measured assessment of participation. This in itself does illustrate the low rate of participation in athletics.

Participation has increased steadily at the West Midlands level. In 2006 some 2.5% of adults participated at least once a week in athletics but it is understood this does include road running and the casual participant, not just athletes who are members of clubs. Participation has increased to 4.3% of the adult population in 2014.

The Black Country participation in athletics has fluctuated from 1.7% of the adult population doing athletics at least once a week in 2006, to 3.6% in 2010 and then to 2.3% in 2014.

Assuming the Black Country participation rate applied to the Dudley 16+ population of 237,294 people this would create 5,457 participants in all types of athletics, including casual road runners and cross country as well as track and field athletes.

Athletic tracks. Of note is that all the four synthetic tracks are located to the north and north east of Dell Stadium. There are no tracks within a-20 minutes or even up to 30 minutes in the south or west of Dell Stadium. Again lack of access and travel distances to the Dell Stadium to the south of the authority and beyond could be a barrier to participation.

In terms of initial provision the focus is very much based on identifying the potential for athlete development and the gaps in opportunities for athletes to train. Are there any actual clubs or potential to develop clubs, what is the profile of athletics participation in schools? This ground swell forms the basis for identifying the potential demand and can be compared to existing supply, distances athletes travel and the scope to develop a track facility.

Overall summary of findings and way forward

Given there is the Dell stadium in Dudley and a long standing club established at the stadium then provision of tracks is not an issue. The evidence base assessment is that the track facility does meet the needs of Dudley and plays an important role in the catchment located towards the south. The track is of good quality and the NGB support the need to ensure it has a sustainable future in line with the national strategy, which could include the development of a synthetics surface in the in-field. The focus for athletics tracks is therefore not about increased provision, but about the continued and future sustainable management operation of the existing track and engagement with club. This will be progressed in the strategy process and alongside the on-going discussions regarding the future Dell management.

Making the Dell site more sustainable should be a key part of the future strategy. Work is on-going about the potential for a Community Asset Transfer (CAT) of the site. Alongside this it will be important to explore investment opportunities. Discussions are underway about potential investment into a 3g pitch to replace the current grass pitch. Funding through the Football Foundation would help to drive further income streams on the site and help to support the overall sustainability.

Gymnastics

5.205 There is no established methodology for assessing the supply and demand for the most popular types of gymnastic activites, these being: acrobatic; aerobic; artistic; display; tumbling and trampolining for both children – aged 5 upwards and for adults.

5.206 The Sport England Active People and Market Segmentation data does not include adult participationin in gymnastics for measuring participation. Also the Active Places Power database does not include gymnastics facilities.

5.207 So the developmnet of the evidence base is built up from information on the supply of clubs in Dudley and from consultation findings for gymnastics. Details of the gymnastics clubs in Dudley based on the British Gymnastics database are set out in Table 5.17 below.

5.208 There is limited information available on the clubs but there are two trampoling clubs and three clubs which provide for all types of gymnastic activites. The Air Dynmaix has British Gymnasticsgym mark accreditation and based on achiveing this status has been supported by British Gymnastics to open a second club venue. Other clubs may also hold gym mark accreditation but this is not confirmed.There is no information on the mmebrship of the Dudley clubs except for the Air Dynamix trampoling club which as 50 members and is increasing its membership. The trend os forincreasing childrens' participation and most clubs do have waiting lists. A typical gymnastics club providing for the ful range of activities and focusing on members aged between 5 – 17 is 200 members and most have waiting lists.

5.209 The barrier to increasing memebrship is most usually the lack of club owned dedicated facilities or increasing the amount of tiume available for gmnastics in multi purpose venues such as public leisure centres.

5.210 The Borough Council leisure centres are the host venues for three of the clubs and Ellowes Sports Coillege is also a host venue.

Table 5.17: Gymnastics clubs in Dudley 2014

Name of club	Gymnastic activities and memnberaship/coaches	Venue
Air Dynamix esatablished in 2011	Trampolining. 50 members and growing. 4 Coaches	Leasowes Leisure Centre Halesowen and formerly Ellowes Hall Sports College
Dudley Gymnastics Club	All activities	Dudley Sports Centre
Earls Gymnastics Club Halesowen	All activities	Hagley High School and club has its own dedicated club facility but wants to expand to another dedicated club facility
Ultimate Gymnastics Club Stourbridge	Trampolining	

Consultation with the National Governing Body

5.211 The views expressed by British Gymnastics about development of gymnastics in Dudley are:

- British Gymnastics does not have any priority geographical areas – instead we work with affiliated clubs who want to work with us in order to provide more opportunities to participate in our sport

- Their views on the quantity, quality and access to provision were that – where clubs have seen the demand and have the capacity to create Satellite Clubs, we've been able to find the venues, with the support of the CSP, for this. All venues have been of a high quality standard. Earls Gymnastics Club are still looking for a unit to enable them to expand in a bigger dedicated facility of their own, and have been struggling to find somewhere that is suitable

- In terms of priorities for development their views – Earls Gymnastics Club facility development remains a priority.

Overall summary of findings and way forward

5.212 Protection and enhancement of the existing Gymnastics facility at Earls provides the way forward.

Cycling

5.213 The Active People survey measures participation in cycling. Cycling in Active People is defined as recreational cycling, it does not include cycling to work or competitive cycling in road races, or, cycling on purpose built off road cycling tracks or courses.

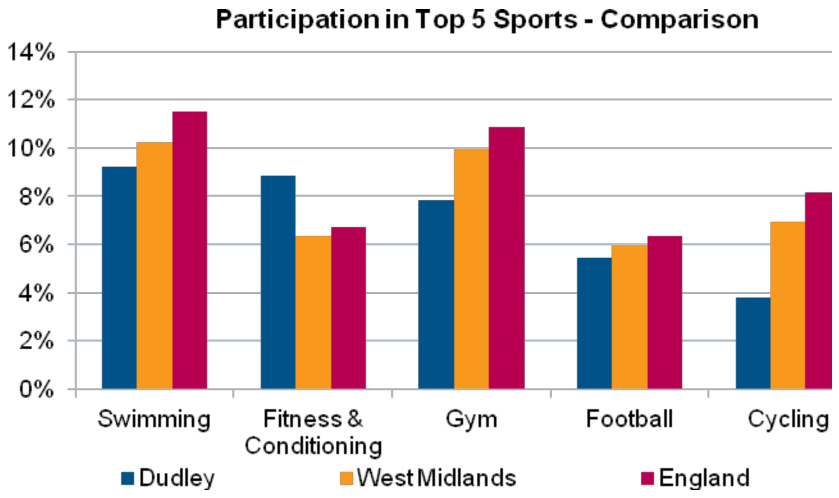
5.214 The Active People data for recreational cycling is not available at the Dudley borough level except for APS 1 in 2006, when 3.5% of the Dudley adult population participated at least once a week (yellow figure in the chart below).

5.215 The findings for the Black Country CSP are available and this shows in the chart below that recreational cycling was 3.26% of the Black Country adult population cycling at least once a week in APS 1 in 2006. The rate of participation has fluctuated since, being 2.09% in APS 6 in 2012 but has increased since to 3.45% in APS 8 in 2014.

Chart 5.18: Active People once a week participation in recreational cycling for the Black Country 2006 - 2014

5.216 Recreational cycling is the fifth most popular activity in Dudley- this is based on participation at least once a MONTH as shown in the chart below. Some 4% of the Dudley adult population are estimated to participate at least once a month. This is a rate of participation which is consistent with the Black County once a week measure of participation however it is below the West Midlands and England averages, as illustrated below.

Chart 5.19: Most popular sports and activities in Dudley Borough based on participation at least once a month



5.217 In terms of the governing body view on cycling these are set out below:

- There are 16 permanent, traffic- free cycle sport facilities in the West Midlands region. Of these facilities there is one which is located in the Borough of Dudley - Halesowen outdoor Velodrome at Manor Abbey Stadium. This facility is privately operated by Halesowen Athletic and Cycling Club

- As part of the ongoing consultation to inform the development of British Cycling's new National Facilities Strategy, recent consultation with the Regional Development Team and Regional Board members has not identified a strategic need to develop any new cycle sport facilities in Dudley. The consultation has not identified any key demand issues in Dudley. Within the wider region, the potential need has been identified for two new Closed Road Cycle Circuits, indicatively located in the North East and South East of the West Midlands region. The possible long term need for an indoor Velodrome in Birmingham has also been identified.

- Halesowen Athletic and Cycling Club have a strong membership base and British Cycling continues to support the Club in rider development and hosting of cycle-sport events.

5.218 Protect current provision at Halesowen Athletics and Cycling Club. Potential to consider closed road circuit as part of any new multi-sport provision.

Introduction

6.1 FMG Consulting have previously written a number of reports to the Council on the different management options available for its sports, leisure, museums and community hall facilities. These reports have included the potential financial impact of outsourcing the management of the facilities and one of the reports considered the possible transfer of services to the Sandwell Leisure Trust.

6.2 These reports have suggested previously that outsourcing the contract to an existing leisure trust vehicle may leverage savings of circa between circa £260,000 and £400,000 per annum, mainly through the financial benefits associated with savings in national non-domestic rates, VAT and increased revenue generation relating to fitness memberships, although it highlighted that some further detailed work would need to be undertaken on the impact of pensions and also central support costs.

6.3 This section of the study updates previous work and includes revisions to the income projections for private and trust options and the impact of capital investment likely to be required. However, it also links the management options to the needs and evidence and future facility strategy and considers the most appropriate vehicle to deliver the future facility stock.

6.4 In order to guide the Council through this, at this stage the finance and management appraisal provides an overview of the financial baseline and highlights the issues the Council will face if they seek to develop alternative management arrangements. It then sets out the broad management options and the relationship between financial considerations and the potential management options. This phase one report considers the facilities and services in their current form. Once the first phase report is agreed phase two of the work will consider the management and financial options in the context of the strategy recommendations which might mean; *retaining the existing facilities, rationalising provision or providing new or replacement facilities.* **This is set out in section 7.**

6.5 The first part of this section therefore sets out the financial implications relating to potential future management arrangements of the sport and leisure services, taking into account existing contractual arrangements, internal loan repayments and tax adjustments. The second part considers potential management options and comments on the implications for the Council in terms of finance, strategic and service delivery.

6.6 The facilities and services covered by analysis are set out in the table below:

Table 6.1: Facilities covered by the analysis

Sports Facilities
Halesowen Leisure Centre
Dudley Leisure Centre
Crystal Leisure Centre
The Dell Stadium
Leisure Management

Financial analysis

6.7 This section includes the following considerations:

- Key Issues
- Financial Implications

Key Issues

6.8 There are a number of key issues that need to be considered by the Council prior to deciding on the most suitable way forward, These key issues include:

- Impact from Pensions Transfer
- Impact on Central Support Costs
- Departmental Management Overheads
- Central Maintenance costs

Impact on Pensions from Outsourcing

6.9 When a large number of staff is outsourced from the Local Government Pension Scheme (LGPS), it can have an impact on both the new employer and the Council. It is important that these costs are reflected in the overall cashflow projections of the Council post any transfer and also included in the projected management fee of the new operator.

6.10 The impact of a large number of staff leaving the LGPS may have implications on the Council's current superannuation contribution rate, as the value of the fund, the current and future liabilities to meet pension payments and the age of those remaining within the scheme and who continue to contribute will change. Likewise, the management fee needs to reflect the contribution rate for the transferring employees and the cost of any bond requirements required by the Pension Authority.

6.11 Where the Council elects for the transferring staff to be admitted into the Local Government Pension Scheme (LGPS) under Admitted Body Status this allows the transferring staff to continue to accrue the benefits associated with their current pension scheme. The alternative can be for the new operator to offer a "broadly comparable" scheme, which may a defined contribution scheme rather than the defined benefit scheme currently offered by the LGPS.

6.12 At this stage we have received information from the Council that the impact on the Council's contribution rate will be minimal and can be ignored for this exercise. Information is currently being forwarded to the WMLGPS actuary in order to establish the impact of outsourcing on the new employer's contribution rate and the cost of any pension bond required.

Impact on central support costs

6.13 Under the outsourcing of the service to a third party, none of the current central support costs that are recharged to the facilities by Council departments will be required by the new operator as they will have their own support staff (e.g. finance, accountancy, human resources, ICT services, Chief Executive department etc.) unless of course the preferred management option is to set up a new leisure trust where it may be that the new trust will wish to access the Council's support services under a Service Leval Agreement.

6.14 Central costs from other Council services and departments are charged to the sports department through the "Recreation" Cost Centre. The value of these costs charged to the department in 2013/14 was £557,000 (in 2014/15 these are £553,000) of which, circa £210,000 related to a recharge from Property Services for maintenance of the sports and leisure facilities.

6.15 It is not clear if this maintenance recharge relates to preventitiive planned maintenance, servicing contracts and/or reactive maintenance, all of which would be the responsibility of the outsourced Operator, or if these costs relate to "landlord" type works (replacement of plant, building fabric etc.) For the purpose of the financial model we have assumed that this budget provision will be retained by the Council to meet its "landlord" maintenance responsibilities going forward.

6.16 We have not received any details on the number of staff working in the central support services, their salaries or the basis of any allocation to the leisure service in order to calculate an estimate of the potential savings that may accrue to the Council where the leisure facilities are outsourced alone and there being no longer a requirement to use these central support services from the Council.

6.17 The Council may wish to take comfort that these savings are normally difficult to realise, as they involve staff savings in other departments within the Council, and in most cases, the apportionment allocations used to recharge the costs to the frontline services are not sufficiently scientific. We would suggest that any savings should not be a primarily consideration in whether to outsource the leisure facilities.

Departmental Management Overheads

6.18 The financial model includes a cost centre called "Recreation" that holds the management costs of the Sports and Physical Activity Section in the Council. We understand that this includes 6 posts covering the senior management as well as support costs including marketing, training, membership direct debit collection etc. These costs fall outside the Net Direct Cost of the facilities. These costs are detailed in the table below.

Table 6.2: Employee Costs associated with Recreation Cost Centre

Position	Actual 2013/14 £	Retained %	Retained £	Notes
Head of Service	54,120	100%	54,120	Retained within Council
Operations Manager	41,173	100%	41,173	Retained for Contract Monitor
Training & Dev Officer	25,707	0%	0	Transfer
Promotions Officer	17,980	0%	0	Transfer
Membership Administrator	15,598	0%	0	Transfer
Casual Training Assessor	471	0%	0	Transfer
Sub Total	155,049		95,293	
Weekly Wages	141		0	
Total Basic Salary	155,190		0	
Overtime	351		0	
National Insurance	12,320		7,565	
Superannuation	24,893		15,285	
Grand Total	192,754		118,143	

6.19 As part of any transfer of services, it would be necessary to split these costs between those posts that are likely to transfer and those that will remain with the Council.

6.20 For the purpose of financial modelling, we have assumed that the Head of Service will stay at the Council and the current Operations Manager post will undertake the role of client contract manager. For modelling purposes we have included the full costs of the Recreation Cost Centre in the direct costs of the service, and therefore an adjustment of £118,143 has been made to the financial model.

Building Repairs and Maintenance Costs

6.21 In 2013-14 the Council incurred £82,707 on day-to-day maintenance costs across the facilities. Our analysis suggests that a further £50,000 was saved against the budget last year, but in reality, the budget at the facilities and in the Recreation Cost Centre totals together circa £133,000 per annum. We have not been able to establish the sufficiency of this figure, but this amount has been transferred to the new operator and included in their projected management fee.

6.22 We understand that the service also receives a recharge of £210,000 from the Corporate Property department (see Central Costs above), which relates to the maintenance of the assets. We are unclear as to the basis of the recharge or what the works cover, but we have assumed that this will in full or part, be retained by the Council to meet any of the Council's obligations under the contract in relation to maintenance of the buildings and major plant.

6.23 As this amount is currently shown as an indirect cost, this means that another department of the Council controls it. On that basis, it does not impact on the projected management fee calculated within the financial model unless some or all of the cost relates to day to day or preventative or reactive maintenance.

Financial Impact of Base Management Options

6.24 This section covers the financial implications of the potential outsourcing options to the current stock, before the impact of any changes or recommendation from the Facility Strategy[2]:

- the current net direct costs of the services
- potential changes to services based upon current performance
- capital investment
- VAT savings
- NNDR savings
- other financial adjustments
- profit, overheads and contingency

6.25 A copy of the financial model database which includes the base budget, agreed service adjustments, VAT analysis and other financing or contract arrangements is shown in an appendix to this report.

[2] These will be modelled at Phase 2 of the work set out in section 7

Current net direct costs

6.26 The table below sets out the current net cost of service and then the adjustments for central support recharges, capital financing costs or departmental recharges to provide the Net Direct Cost of the Services. This is the starting point for the value of the management fee used in the modelling of each of the outsourcing options.

Table 6.3: Summary of Net Direct Cost of Service

	All	Crystal Leisure Centre	Dudley Leisure Centre	Halesowen Leisure Centre	The Dell Stadium	Recreation
Income	2,583,602	1,282,265	587,316	663,935	48,553	1,533
Expenditure	-5,948,095	-2,299,740	-1,492,430	-949,471	-212,414	-994,040
Net Cost of Service	-3,364,493	-1,017,745	-905,114	-285,536	-163,861	-992,507
Less:						
Central Recharges	732,554	20,700	5,000	7,500	7,800	691,554
Department Recharges	540	190	160	30	160	0
Capital Charges	739,069	250,710	417,579	57,470	12,760	550
Net Direct Cost of Services	-1,892,330	-745,875	-482,375	-220,536	-143,141	-300,403

6.27 It can be seen that the overall net direct cost of the management and facilities are £1.892 million, and excludes any central recharges, central maintenance provisions or capital charges. We have taken the actual costs rather than budgeted costs for the purposes of our financial model as these are more likely to be representative of the operating costs of the business.

Adjustments to Current Performance

6.28 A key test to understand the performance of each facility is to benchmark the income and costs against other similar facilities. This exercise does not cover the sufficiency of the current operating costs of the business or whether income is being maximised or expenditure optimised. When calculating the projected management fee, it is wise to establish whether there is any opportunities to adjust the current net direct cost of the service through benchmarking the current performance of the business and to make adjustments, where appropriate.

Table 6.4: Benchmarks Comparison

FMG Benchmarks	Crystal Leisure Centre	Dudley Leisure Centre	Halesowen Leisure Centre	FMG Benchmark
	Wet and Dry	Wet and Dry	Wet and Dry	
Income per m2	£233	£182	£190	£256
Income per visit	£2.45	£2.37	£1.90	£3.43
Visits per m2	95	77	100	76
Income from Fitness (per stn)	£4,985	£2,535	£4,929	£7,806
Average Members per station	21	10	22	20-25
Income per Sports Hall Court	£15,212	£16,299	N/A	£16,107
Income from swimming per m2	£851	£827	£512	£783
Marketing as % of income	N/A	0.03%	N/A	1.9%
Cost of Sales Margin	115.6%	190.1%	241.5%	56%
Secondary income per visit	£0.04	£0.03	£0.02	£0.29
Utility Costs per m2	£56.82	£45.87	£49.34	£49.30
Maintenance costs per m2	£7.98	£2.87	£2.38	£24.26
Staffing costs as % of income	100%	125%	86%	71%

6.29 As set out previously it can be seen that in overall terms, visits per m2 are above benchmark, which is positive, and also income from the sports halls is above or close to benchmarks. Swimming is positive, although the market is experiencing over £1,000 plus per m2 from new swimming pools and where there is strong demand for swimming lessons. We have classified maintenance as being positive, but in reality these reflect the amount spent and not the repair and maintenance requirement. In 2013/14, maintenance budgets were purposefully underspent in order to try to achieve a balanced budget for the service.

6.30 Gym income is a main income generator for a leisure centre but the level of income falls below the level of benchmark (income per station), which should be circa £7,800 per station. A review of the sites would indicate that the gyms are well laid out, with quality equipment and are well staffed, but the low level of income is likely to be as a result of too many pieces of equipment for demand (Dudley Leisure Centre), and also the lower than average yields (Crystal and Halesowen have an average number of members per station). This is also supported by the level of income per m2, which is below benchmark, but the number of visits per m2 is above benchmarks. We have not assessed the level of demand for fitness to see if membership sales are performing well.

6.31 Following our site visits and benchmarking analysis, it is likely that adjustments should be made to the current net direct cost of service under the different management arrangements as shown in the table below.

Table 6.5: Adjustments to Net Direct Cost of Service

All £	In House	Private Sector	Existing Trust	New Trust
Increase in Maintenance Costs	0	-25,152	-30,182	-30,182
Decrease in Utility Costs	0	30,538	36,645	36,645
Increase in Swimming Income	0	54,732	65,679	0
Increase in Fitness Income	0	20,282	24,338	0
Increase in Marketing Costs	0	-77,508	-93,010	-51,672
General increase in income/cost savings	0	143,857	148,509	70,595
Total	0	152,495	156,138	9,780

6.32 We have based the provision for maintenance costs at circa £297,000 reflecting the benchmark cost per m2 of circa £24 against the m2 of the buildings. From this we have adjusted for the actual costs incurred in 2013-14 of £64,000 and then made a further adjustment for the £210,000 corporate provision, which leaves a shortfall of circa £25,000 per annum. An offset adjustment is made later in this report for the underspend incurred on maintenance by the Council in 2013-14.

6.33 In terms of utility costs, we have calculated that these should be £632,000 at benchmark compared to the actual cost of £650,000 and we have therefore reduced the costs under the different options to reflect this likely saving. Indeed it may be that benchmark cost per m2 of £49 could be reduced further by the private sector or existing trust options.

6.34 We cannot find the budget for marketing and therefore we have included a general provision linked to 2% of income under the private sector, existing trust and new trust options.

6.35 In terms of swimming income, we believe that a substantial investment in the changing facilities at Halesowen would be undertaken by a new operator, which in turn would see a substantial increase in swimming income (20%) from this site.

6.36 Fitness income and members per station are average across the business, but in Dudley the number of members per pieces of equipment is substantially below benchmark (9 members per station compared to 20 members benchmark) and we see the outsourcing options leveraging increased utilisation in the gym by 10% at this site. In previous reports we estimated that a new operator would leverage income at circa 70% of benchmark for income per piece of equipment, but site visits and a review of actual yields has resulted in a substantial reduction in this previous projection.

6.37 We have also included a general provision of improvements to overall income and also efficiency savings under the private and existing trust options. We have applied 3% to the net income and net direct costs, adjusting for VAT under the existing trust option.

Capital investment impact

6.38 Any outsourcing of the contract to a third party will result in capital investment, although it may be more difficult for any new trust to borrow the money with its limited track record. However, where this occurs, we normally see the local authority using its prudential borrowing powers to support any new trust.

6.39 The table below sets out the high level capital investment for any new contract. It can be seen that a substantial amount will be used to replace the existing fitness equipment, but we have also made provisions for the changing facilities at Halesowen, updated equipment across the portfolio and general provision for deep cleaning, painting, signage etc. At this stage, these provisions are very high level. This obviously reflects minimal investment and a stand-still position. Phase two will consider the impacts of the levels of capital required to deliver the strategy, which will incorporate potential re-development or new build considerations.

Table 6.6: Overview of Capital Investment

All £	In House	Private Sector	Existing Trust	New Trust
Investment in changing facilities	0	50,000	60,000	0
Replacement of New Fitness Equipment	720,000	720,000	864,000	864,000
General Investment - Deep Clean, branding etc.	0	25,000	30,000	0
General equipment	0	50,000	60,000	0
Total	720,000	845,000	1,014,000	864,000

Impact from NNDR savings

6.40 The current cost of national non-domestic rates (2013-14) is £380,737 per annum. Non-Domestic Rates is a tax on properties not in domestic use, e.g. hotels, offices, public houses, schools and shops. The amount payable is calculated by multiplying the Rateable Value of the property by the National Rate Poundage set by the Government.

6.41 Under the Local Government Act 1988, different legal entities are entitled to mandatory or discretionary relief from the payment of National Non-Domestic Rates. Discretionary relief is down to the policies approved by each local authority. The table below sets out a summary of what relief is available:

Figure 6.1: NNDR Relief

Property Eligible for Relief	Type of Relief	Amount of Relief
Property wholly or mainly used for charitable purposes, which is occupied by a registered charity or charity shop	Mandatory Discretionary	80% Up to a further 20%
Property, all or part of which is occupied for the purposes of a non-profit making club, society or other organisation and is used for the purpose of recreation	Discretionary	Up to 100%

6.42 The requirements for obtaining NNDR relief require the property to be eligible for relief but other tests include the Contractor holding a lease (being in rateable occupation) for the premises and that it has control over the staff managing the services from the property.

6.43 Applying this to the different management options, the following reliefs may be available:

Figure 6.2: Types of Reliefs for each management option

Management option	Mandatory	Discretionary
Private Management (Hybrid)	-	Yes
Joint Venture	See Note 1	See Note 1
Trade Sale	Not applicable	Not applicable
Community Interest Company	No	Yes
New NPDO	Yes	Yes
Existing NPDO	Yes	Yes
Charitable Incorporated Organisation	Yes	Yes

***Note 1** – It is assumed that under a Joint Venture the structure could either be a NPDO, private management company or a Community Interest Company and would obtain the relief under these respective headings.*

6.44 Under the Business Rates Retention Scheme that was introduced in April 2013, the Government have set the tax base for which NNDR is calculated and paid to each local authority. The guidance notes from the Government suggest that the NNDR tax base will be reviewed every 7 years but any adjustments in NNDR during this period will be shared on a 50:50 basis.

6.45 In terms of the fiscal benefits associated with this project, the level of NNDR payable is £380,737 on the sports and leisure facilities. We have reviewed the Council's policy relating to discretionary rate relief. It does offer the top up to mandatory relief and this is funded 50:50 between the Council and the Government. We do note that the Council has decided that it will consider the provision of this relief on a year by year basis, and we have therefore prudently shown the saving for the mandatory element only.

Table 6.7: Calculation of NNDR Savings

All £	In House	Private Sector	Existing Trust	New Trust
Total NNDR Payable per Database	380,737	380,737	380,737	380,737
Mandatory Relief	0	0	-304,589	-304,589
Balance available for Discretionary Relief*	380,737	380,737	76,147	76,147
Relief for Charitable Body	0	0	0	0
Relief for Non Charitable Body	0	0	0	0
Balance Payable	380,737	380,737	76,147	76,147
Proportion that is retained by Council	50%	50%	50%	50%
Saving	0	0	152,295	152,295
Saving as % of Council amount payable	0%	0%	40%	40%

6.46 Where the discretionary rate relief was applied, the NNDR savings would be £190,368 compared to the £152,295 per annum a difference of £38,073 per annum.

Impact on VAT

6.47 Under the different management options, VAT applies differently to the services provided by each type of operator. For example a charitable Trust does not have to charge VAT on its leisure services (except retail and catering services), whilst the private sector have to charge VAT on the majority of its services, with some exceptions like block bookings, 24 hour hire of facilities etc. The Council has to charge VAT on most of its services, although swimming lessons for example are exempt.

6.48 We have calculated the likely impact on the net cost of the services using the current VAT position of the Council providing the service currently.

Table 6.8: VAT Savings under each option

All £	In House	Private Sector	Existing Trust	New Trust
Impact on Income from VAT	0	-113,615	383,446	383,446
Irrecoverable VAT	0	-157,858	-182,015	-180,485
Total	0	-271,473	201,431	202,961

6.49 It can be seen that the private sector option is required to pay more VAT on its income than the Council does by £113,615, which means that if the private sector operated the facilities the income they could retain would be lower than that of the Council, as income from say swimming lessons is subject to VAT for the private sector, and therefore their net income will be lower.

6.50 Likewise the Trust does not have to account for VAT on sport and leisure income, whereas the Council has to charge VAT on certain services, and therefore charging the same prices would mean the Trust would keep more of the income than the Council is able to do so by circa £383,000 per annum.

6.51 The general principle of recovering the VAT paid for supplies and services is that it can only be reclaimed in the same proportion as the income that is subject to VAT for services provided to users. In calculating the "VAT recovery rate" it is necessary to establish the income that is subject to VAT plus also taking into account the income from the management fee, which is also subject to VAT.

6.52 As a result, a comparison with the Council which is able to recover all the VAT is pays on its purchases, shows that an adjustment is needed to be made for the cost of non being able to recover all the VAT each of the options pays. When this irrecoverable amount is taken off the VAT benefit on income, it leaves a net saving for all options other than the private sector option.

Operator overheads

6.53 The Operator will seek to recover their central support costs through its own contracts, and these amounts are normally a percentage of income to finance these. Again, different models use different percentages, on the basis that the "Head Office" costs are distributed over a number of contracts, which in turn spread the cost of the Head Office costs. The table below sets out a summary of the likely costs of Operator Overheads.

Table 6.9: Calculation of the Operators overheads under each option

All £	In House	Private Sector	Existing Trust	New Trust
Income	2,583,602	2,537,917	3,045,827	2,967,048
% of Income	N/A	3.0%	3.0%	Fixed
Amount	0	-76,137	-91,375	-250,000

6.54 The private sector and existing trust options normally are able to spread their legal, finance, personnel and IT costs etc. over a vast number of contracts and this reflects the 3% used. The existing Trust could be similar but could be higher depending upon the size of the Trust and the number of contracts it holds.

6.55 We have included a general provision of £250,000 for the new Trust and this will include a range of support services including finance, accountancy, payroll, IT services, HR services and legal plus the cost of accommodation. Sometimes these are purchased from the Council under service level agreements.

Profit and contingency

6.56 Under the different management options, the operator will seek to make a charge for their profit and contingency. There is no strict guide to the level of these, which is dependent upon how busy the leisure contracting market is, the level of risk transferred to the Operator from the Council and the Operators own pricing mechanism.

6.57 There are some trends in the market, bearing in mind that the private sector normally have shareholders which need to see a profit to see a return on their investment, existing Trusts normally need to set aside operating surpluses as contingency against changes in income and costs or to pay a "service" fee to their parent company and new Trust need to generate cash reserves to meet unexpected changes in income or service costs.

6.58 The table below sets out the % applied to income to cover profit and contingency under the different management options.

Table 6.10: Calculation of profit and contingency under each option

All £	In House	Private Sector	Existing Trust	New Trust
Income	2,583,602	2,537,917	3,045,827	2,967,048
% of Income	N/A	5.0%	5.0%	5.0%
Amount	0	-126,896	-152,291	-148,352

Other Adjustments

6.59 We have not received any information from the Council or the Pensions Authority relating to any changes to the Council's superannuation rate for the Council's residual staff or the new rate to be applied to the transferring employees. On that basis the financial model does not include any financial adjustments relating to pensions.

Table 6.11: Other Adjustments

All £	In House	Private Sector	Existing Trust	New Trust
Maintenance Costs	-40,000	-40,000	-48,000	-48,000
Pension Adjustment - Employers Rate	0	0	0	0
Pension Adjustment - Interest on Bond	0	0	0	0
Debt Costs on Initial Capital	-111,249	-146,033	-175,239	-149,316
Adjustment for Capital Appropriation	-34,500	-34,500	-34,500	-34,500
Adjustment for Retained Management	118,143	118,143	118,143	118,143
Total	-185,749	-220,533	-257,739	-231,816

6.60 In calculating the new financial impact of each of the outsourced options, we have made a number of adjustments to the starting point, which was the 2013-14 actual financial performance of the business.

6.61 In terms of maintenance costs, the Council reported that these were purposefully underspent last year, but going forward these will need to be reflected in the forward cost of the business under all of the options. The increase of £8,000 between the private sector and existing trust/new trust options is the irrecoverable VAT.

6.62 As we do not have any details about the pension valuation, we have not been advised if there will be a change to the Employers Rate or the requirement for a bond, so these have been left blank. As mentioned in 6.12, work is on-going on this issue.

6.63 The capital investment mentioned earlier in this section has been financed over the 10 years using a 5% interest rate for the outsourced management options, with the Council debt costs calculated at 2% per annum. This level of debt provision will change depending upon the actual investment incurred by each option, the method of financing (debt/leasing) and the interest rate at the time.

6.64 In the actual accounts for 2013-14, there is a credit on an account under capital appropriation, which is suppressing the net cost of the business. On this basis, we have reversed this credit in the forward projections under all options on the basis that this was a one off.

6.65 Earlier in the section reference was made to the Recreation Cost Centre, which holds the management costs of the business including staffing costs. We have included all the costs associated with the cost centre in the Net Direct Cost of Service, but as some of these costs will not transfer, we have added these back from the calculation of the management fee.

Summary of Projected Management Fee

6.66 A summary of the management fee over an estimated 10 Year period (excluding inflation), additional Council costs including all the adjustments included within this section for each of the options is shown in the table below.

Table 6.12: Summary of Adjustments and Management Fee

Management Fee	In House	Private Sector	Existing Trust	New Trust
Current Net Direct Cost	-1,892,330	-1,892,330	-1,892,330	-1,892,330
Central Overheads (% of income)	0	-76, 137	-91,375	-250,000
Maintenance Costs	-40,000	-40,000	-48,000	-48,000
NNDR Savings	0	0	152,295	152,295
Pension Adjustment – Employers Rate	0	0	0	0
Pension Adjustment – Interest on Bond	0	0	0	0
Debt Costs on Initial Capital	-111,249	-146,033	-175,239	-149,316
Adjustment for Capital Appropriation	-34,500	-34,500	-34,500	-34,500
Adjustment for Retained Management	118,143	118,143	118,143	118,143
Changes to Services	0	152,495	156,138	9,780
Impact on Income from VAT	0	-113,615	383,446	383,446
Irrecoverable VAT	0	-157,858	-182,015	-180,495
Profit and Contingency (% of Income)	0	-126,896	-152,291	-148,352
Revised Management Fee	-1,959,935	-2,316,731	-1,765,728	-2,039,320
Saving / Additional Cost compared to In House	**In House**	**Private Sector**	**Existing Trust**	**New Trust**
Saving / (cost)	0	-356,795	194,207	-79,384

6.67 The table above provides a summary of the projected **management fee** for the management of the current leisure facilities. When compared to the existing net direct cost of the service it can be seen that the cost of the private sector option is significantly more expensive due to the provisions for profit, overhead recovery, debt costs and VAT.

6.68 However the Trust options are a lower cost that the private sector option, and the existing Trust makes savings of circa £194,000 when compared to the current net direct cost resulting from the fiscal benefits of NNDR and VAT savings and operational efficiencies and income generation, although these are set off by provisions for profit and operator overheads, debt costs and lower than anticipated revenue generation than previous calculations.

6.69 The new Trust saves money compared to the private sector option but more expensive when compared to the Existing Trust option. Although the new existing trust shares the benefits similar to the existing Trust, the overheads of the new Trust are substantially larger than the existing Trust option, the latter spreading their business overheads over a number of contracts.

6.70 The baseline financial position therefore provides the Council with an understanding of the potential financial issues and implications of alternative management arrangements. At this point it is evident that the outsourcing to an existing trust appears to be financially advantageous compared to the current costs based on the current facilities and service configuration.

6.71 However, it must be borne in mind that Table 6.10 is based on actual 2013/14 costs and income and does not refer to performance against the budget held by the Council. We understand that for 2013/14, the under-achievement of income compared to budget was £185,000 but savings were made elsewhere in the budget to reduce this down to a net overspend position of approximately £100,000. The position is similar for 2014/15 with income achievement currently forecast to be approximately £150,000 down compared to budget with this position being managed in the year by one-off's such as use of reserves and rates refunds.

6.72 The summary shown in Table 6.12 reflects the likely management fee to be charged by a provider. However, it is essential to understand that this does not necessarily reflect the likely budget saving to the Council. The issue raised in 6.71 will reduce the £194k saving but also the level of staff retained by the Council to undertake the "client" role will impact on the saving to the Council.

6.73 The next section sets out the management options in more detail and sets out the further detailed considerations the Council will need to take on board.

Management Options

6.74 There are a number of options for the future management of a local authority's sport and leisure facilities and services, many of which could incorporate other Council functions and services such as sports development, libraries, museums and theatres etc. There are a number of different management options available for local authorities to consider in relation to the management of their sport and leisure facility stock, each with their own advantages and disadvantages. It may be that one model covers all of the sport and leisure facilities provided by local authorities or that specific models will suit some of the facilities and not others.

6.75 For instance, as is currently under consideration in Dudley, parts of the service may be better managed under a different vehicle. There is currently a feasibility study taking place into the potential Community Asset Transfer (CAT) of the Dell Stadium. Wider partnerships with neighbouring authorities, the health and the education sector may also be more appropriate than traditional leisure management routes.

6.76 The broad management options are as follows:

Table 6.13: Management Options

Management and Facility Options	Detail
Outsourced Management	Contract with: • Private management contractor • Contract with an existing Trust
Set up a New Delivery Vehicle	Establishing a new Trust or other form of social enterprise company: • Unincorporated Charitable NPDO; • Industrial and Provident Society (IPS); • Company Limited by Guarantee (GLG); • Charitable Incorporated Organisation (CIO); • Community Interest Company (CIC).
Transfer of Assets	Asset transfer (e.g. to town/parish councils, educational establishments, community organisations or sports clubs).
Set up a Joint Venture Company	Establishing a Joint Venture company with an external operator.
Sale of the Assets	Disposal of assets on the open market / trade sale.

6.77 The appendix sets out a summary of the advantages and disadvantages of each type of management arrangement, including asset transfers and the sale of the assets. The different types of management do have a number of differentials that address risk transfer and also come with different financial benefits given their legal status (e.g. charitable company, private limited company etc).

6.78 The options are wide ranging and the ultimate decision will depend on assessment and evaluation of a local authority's situation, priorities and requirements across a number of key issues such as:

- level of revenue savings required and in what timescales;
- the balance between financial and non-financial objectives;
- the condition of the facility stock;
- amount of capital available to invest;
- level of capital investment sought from the delivery vehicle;
- attitude to risk and the level of risk transfer being sought through the process (e.g. asset lifecycle risk, utilities tariff increase risk, pensions deficit risk etc.);
- the amount of control that the Council wishes to retain (e.g. over facilities on offer, pricing, programming, branding etc.);

- the deliverability / viability of the authority's strategic vision under each delivery vehicle;

- the wider outcomes that the management vehicle must deliver and the areas in which it must be 'commissionable';

- the extent to which local community involvement in the delivery vehicle is required; and

- the flexibility required for future changes to be made to the service by the Council in the short, medium and long-term.

6.79 Before taking a decision on its intended future management vehicle, a local authority should evaluate each option against these (and potentially other) areas as part of a management options appraisal / business case process. This will be undertaken as part of phase two. As a minimum, the management options appraisal must contain an in-depth analysis of the following issues:

- the strategic context for the service;

- the current performance of the service (financial and non-financial) including benchmarking;

- legal and procurement implications;

- staffing and TUPE implications;

- risk analysis;

- revenue implications;

- capital implications;

- central support cost savings; and

- implementation timescales and costs.

6.80 It is crucial to stress that this phase one report only provides an overview of the options and highlights some of the relevant issues that Dudley should be considering. Phase two of the work will consider the detail of the preferred options.

6.81 There are a number of issues that need to be considered when assessing the optimum management arrangements for Dudley including:

- Impact from Pensions Transfer – what are the Councils requirements or expectations relating to pensions, do they want their staff to transfer to the Local Government Pension Scheme (LGPS) or are the Council happy that following any outsourcing staff will receive a "broadly comparable pension" or a stakeholder defined contribution scheme – these have financial implications in the management fee charged by the operator to the Council

- Impact on Central Support Costs – are there any savings that may be leveraged from outsourcing services by way of payroll services, HR services, legal and accountancy services etc, and if so, what is the value of these savings that can be used in the overall financial impact of outsourcing

- Departmental Management Overheads – how are management overheads dealt with, are they subjected to TUPE and are reflected in the cost of the contract or are they retained by the Council in a monitoring role

- Central Maintenance costs – the current net direct cost of the service includes provisions for maintenance, but there are central maintenance contributions that need to be reflected in the overall cost of service and agreement will need to be reached on the level of any transferable budget from the centre to meet any costs of maintenance that is transferred to the operator but which is currently not controlled by the leisure service department

- Facility strategy future shape of facility portfolio and service and capital costs.

6.82 Consideration of the local market will also be important.

Dudley Context

6.83 The review of the current Dudley leisure portfolio identified that the current buildings were old, poorly laid out with out-dated design and in need of some investment. However the staff appeared to be positive and enthusiastic and take great pride in the service and the quality of the facilities. The needs assessment and consultation (see next section) sets out a clear case for change and investment, particularly in terms of the swimming pool stock.

6.84 At present whilst adjustments for increased income and some operational savings have been made, the main difference between each of the management options is the leverage of fiscal savings generated from the legal status of the operators and some operational efficiency and income generation. The main savings are NNDR and VAT and given the current market, all the operators would be able to meet the criteria to make these savings as although private companies, they now all operate as leisure trusts in some format or other. All outsourcing arrangements will protect staff under the TUPE Regulations and the Council can maintain control of the service through an output specification. The Council may retain a level of control over programming and some community pricing.

6.85 A key difference in increasing participation, income generation and optimising operational costs will be the provision of new facilities. These will need to leverage increased income to meet the marginal capital costs from the investment, and given the price points and current usage, this will need to be tested at the next stage where facility options will be modelled and evaluated.

6.86 Based on the analysis to date there are a number of options that can be considered for Dudley but the sale of assets would likely put an end to public sports and leisure in the borough[3], asset transfers would be high risk across the stock given the age of the buildings and lack of economies of scale that the community would bring to the operation compared to experienced leisure management companies. There is however a current feasibility study into the potential CAT of the Dell and the progress of this should continue be considered as a separate exercise, where the risks of transfer are less than with the leisure centre stock.

6.87 The setting up of a new trust by the Council would be positive in financial terms based on the current analysis, but again it is unlikely to compete with the economies of scale and experience of the leisure management companies and it would incur central

[3] Consultation with the Cabinet suggested this was not a desired outcome

management overheads that would be absorbed into one of the leisure management companies.

6.88 Partnering with an existing Trust presents the most sensible and financially beneficial way forward.

6.89 Given the local market a partnership approach may be an appropriate route. From previous work, we know that the Council has worked with other local authorities within the Black Country (Sandwell, Walsall and Wolverhampton) to consider joint service arrangements covering a number of services. Little progress has been made with these projects which included the management of leisure facilities however it may now be time to explore these again.

6.90 Recently however a Strategic Officer from Wolverhampton was appointed as Chief Executive of Dudley MBC and brings experience of developments in the area of public leisure facility management from the City Council and joint-management would therefore appear to be back on the agenda.

6.91 We also understand that the adjacent "Black Country" local authority Sandwell has operated public leisure facilities through their own charitable leisure trust for some ten years. Both Wolverhampton and Sandwell also have Places for People (PFP) operating a number of their facilities under a Public Private Partnership Contract (Bentley Bridge in Wednesfield and West Bromwich Leisure Centre). The other adjacent local authorities to Dudley are South Staffordshire and Bromsgrove. South Staffordshire currently use an In-House model to operate their facilities whilst Bromsgrove District Council has outsourced their leisure management to Wychavon Leisure (a leisure trust established 1999).

6.92 There would therefore appear to be significant opportunities to look at partnership working across boundaries and the applicability of these will depend on the facility strategy outcomes and the level of investment required. There may also be opportunities to look at delivery through a pure private sector model, particularly if delivery of new provision in and around the regeneration areas of Brierley Hill were considered to be a priority.

Summary

6.93 At this stage in terms of the financial and management options the Council are requested to consider the following:

- agree the financial baseline position of the current service as set out, as the position for future modelling in the phase two work;

- consider the fiscal savings and benefits on the current position of the different management options and agree those to be explored further in phase two e.g. is the continued in-house option sustainable in the future; and

- consider the wider Dudley context and provide a steer for any wider partnership discussions e.g. neighbouring authorities, CAT etc

6.94 With the overall net direct cost of the current service at £1.9 million excluding central costs and debt costs, which when included provide an overall net cost of service of £3.365 million.

6.95 Changes to management of the facilities is projected to reduce the net direct cost from £1.9 million to circa £1.6 million (existing Leisure Trust operate the facilities) once savings in NNDR, VAT and other adjustments have been made.

6.96 The Council ambition is to reduce the overall cost of the service, but to do this will involve consideration of a rationalisation programme which may include closure of sites and/or the replacement of sites. This is potentially at odds with the aspirations to increase participation.

6.97 From a financial perspective, the quickest way of reducing the net direct cost of the service is to close leisure facilities, and obviously those sites that cost the most to operate. It can be seen from the table below that Crystal is the most expensive, followed by Dudley and then Halesowen.

6.98 However this only represents the net cost of these sites and does not reflect the type or uniqueness of the services provided at each site. For example Crystal Leisure Centre as leisure water, which may be unique in the catchment, area but is more expensive to operate.

	All	Crystal Leisure Centre	Dudley Leisure Centre	Halesowen Leisure Centre	The Dell Stadium	Recreation
Income	2,583,602	1,282,265	587,316	663,935	48,553	1,533
Expenditure	-5,948,095	-2,299,740	-1,492,430	-949,471	-212,414	-994,040
Net Cost of Service	-3,364,493	-1,017,745	-905,114	-285,536	-163,861	-992,507
Less:						
Central Recharges	732,554	20,700	5,000	7,500	7,800	691,554
Department Recharges	540	190	160	30	160	0
Capital Charges	739,069	250,710	417,579	57,470	12,760	550
Net Direct Cost of Services	-1,892,330	-745,875	-482,375	-220,536	-143,141	-300,403

6.99 Where facilities are closed but replaced with new modern facilities that are demand led and fit for purpose, the fact of the matter is that they need to make a positive cash contribution to the service after taking into account the increase in debt costs to build the new facilities.

6.100 The average cost of borrowing for £1 million capital expenditure is circa £65,000 plus £20,000 a year for building lifecycle costs. Assuming an average cost of a new leisure centre is £10 million this would result in a need for the new facility to reduce its operating cost by a minimum of £850,000 per annum (before any savings were made on the existing budget). This is the extent of the challenge faced by Dudley.

6.101 Clearly given this it will be important that at the next phase, any new facilities that are identified are demand led, the capital costs are minimised and the income from the new facilities are maximised and operating costs are reduced if net savings are to be made from changing the facility mix in the Borough.

Introduction

7.1 The needs and evidence set out in the previous sections provides a baseline on which to develop the future options and future Strategy for Dudley. The management and financial appriasial provides the basis for assessing the deliverability and sustaianability of the potential options and strategy.

7.2 At this point it is evident that an existing Trust Vehicle would appear to be the most financially advantageous route for the Council based on the current facilities and service configuration and there are significant partnership opportunities with exisitng Trusts in the locality. There are however other detaield factors to be considered not least capital financing, if the Council are to keen to deliver a new facility infra-strucutrue based on the needs and evidence.

7.3 Alongisde the hard evidence data there has been extensive consultation undertaken as part of the work. Much of this has been set out in previous sections. The table below provides an overivew of the more generic consultation and alongside the hard evidence data provides the basis of the options and strategy set out at the end of this section.

Consultation

7.4 Building on the supply and demand analysis consultation was held with the key local partners to understand their needs and key drivers. This formed part of the overall needs and evidence process and options development. The consultation focussed on supply key issues and priorities and the findings are set out in the table overleaf.

Table 7.1: Consultation findings

Consultee	Key issues and priorities
Martin Dando, Planning Policy Team	• Any potential development of new provision in Brierley Hill would fit with the Area Action Plan adopted in 2011 and aspiration for the area. Would need to be discussion with INTU • Any developments in and around Dudley which might see the demolition of the existing Leisure Centre could see the site sold for housing in planning policy terms
Neighbouring Authorities – Swimming Provision	• Sandwell have aspirations to develop a 50m pool emerging through their leisure strategy process • Joint meetings have been held with the ASA and Sport England where Dudleys potential pool aspirations were also raised • ASA confirmed that the issue is there is no competition pool or environment for squad training and performance in the West Mids, currently. The Royal School in Wolverhampton, which is used as a training venue for performance swimmers currently, is only 4 lanes x 25m. Other existing performance venues are Coventry and Birmingham • Any new 50m pool would need to demonstrate the links between existing pools and the new performance venue – talent pathway, what, where, and how access. • Agreed that Sandwell Strategy can be finalized on basis of local need and opportunity for a potential 50m pool; Dudley strategy will be finalised after Sandwell • Fpm will potentially look at impact of a 50m pool in either area and this is what will then need to be considered in terms of any potential Sport England funding
Simon Hall, Director Black Country Be Active CSP	• The new Sport and Physical Activity Strategy for the Borough highlights the importance of sport and physical activity to Dudley and the need for change to deliver on the sport and physical activity agenda • Dudley have previously been reluctant to 'do things differently' and innovate around facilities, particularly in comparison to other Black Country neighbours who have seen significant improvements in their facility stock • Dudley needs to see significant change in its facility infra-structure and partnership

Consultee	Key issues and priorities
	opportunities exist with neighbours, the education sector and health • Exciting opportunities to link sport and leisure into regeneration opportunities around the Brierley Hill area.
Steve Cooper and Mary Cox, Property Management and Asset Planning	• Keen to challenge the existing leisure stock but have found the service previously reluctant to engage • The timing is right to take a more radical look at the leisure centre provision in the context of current asset reviews • Dudley Leisure Centre would appear to have the greatest potential for redevelopment • Would like to see innovative partnerships developed between leisure and health provision as adopted by other authorities e.g. Orford Park in Warrington
Cabinet Workshop – Cllr Rachel Harris, Cllr Pete Lowe and Cllr Stuart Turner	• Acknowledgement that the leisure centre service has been in managed decline and is no longer 'fit for purpose' for the 21st century • Committed to investment and rationalisation but must be set within the context of the Council's overall financial position and current funding envelope • Would like to explore development in the Brierley Hill area alongside regeneration • Swimming is considered important and would like to look at diving and possible 50m pool • Dudley Leisure Centre has probably reached the end of its useful life and would like to see consideration of asset sale and re-investment • Partnerships with neighbouring authorities and the College sector should be explored
Neil Bucktin, Clinical Commissioning Group	• Sport and physical activity is a key part of the prevention agenda • Would like to see a closer connection between GPs and local sports provision • There is currently no policy around co-location and joint-provision although the CCG are embarked on an Estates Strategy which should incorporate linking health service provision with other agendas, so there could be opportunities for aligning the

Consultee	Key issues and priorities
	leisure strategy
Andy Gray, CVS and Bill Fryer (CAT consultants)	• The CVS are committed to exploring the feasibility of the Dell Stadium and a Community Asset Transfer similar to the Civic Hall • Consultants have been appointed to undertake an outline feasibility study • Central to the CAT would be animating the site further through greater daytime use, which may mean the development of additional indoor space and development of further partnerships with the CCG and education sectors
Dean Hill, Karen Jackson, Public Health	• Recognition that leisure centres are not the panacea in terms of tackling the sport and physical activity agenda • The leisure centre service is currently peripheral to the sport and physical activity strategy, which is owned and being driven by public health • Not clear what the aims and objectives of the leisure centre service are and the links to health • The main structured relationship is around GP referrals but there seems to be no clear strategy and different centres do different things • The current condition of the leisure centres does not help in attracting users and promoting healthy and active lifestyles • Far greater opportunity for proper integration between health and the leisure centre service, to maximise the impact of leisure centres and the spend on the PA agenda • This could be driven through a procurement process and new partnering arrangements • Other authorities notably Sandwell have managed to make these links. In Dudley itself Public Health have helped to re-shape the Parks Service around the health agenda
Stourbridge College	• There is limited community use of the current Dudley based facilities, which are also limited • The College do use Crystals Leisure Centre • The main focus for future sport development is at CoSE, the Centre of Sporting Excellence,

Consultee	Key issues and priorities
	which is based in Kidderminster
Keith Bate, Principal Halesowen College	• Have good new facilities all on the Halesowen Campus, which are open for community use • Next phase of development – currently have planning permission for a climbing wall
Steve Johnson, Rachel Corns Dudley College	• Town centre camps has seen significant development over the years • 2013 saw the development of a 6-court sports hall, fitness suite and dance studios, which are city-centre based and open for community use • College do not currently use Dudley Leisure Centre could be potential for partnership working if the Council were to re-develop DLC but College at the moment are pretty well served and whilst it would be nice to have access to swimming provision it is not currently a burning need • College currently looking at funding for a town centre 3g pitch • Current arrangements for pitch use at the Dell have currently expired and these would be looked at in the context of progress re the above

7.5 Finance staff and the leisure centre operational staff were consulted with and views are linked into the relevant sections.

Summary

7.6 In terms of the consultation summary there is a clear desire for changes in both the facility provision and serivce delivery. It is recognised that Dudley can no longer continue to *'do what it has always done'*. Dudley are now clearly lagging behind other authorities in the Black Country who have tackled the facility infra-strucutre issues and grasped the links between health and leisure.

7.7 There are clearly opportunites to work with neighbouring authorities and develop greater links with health and regeneration. In planning and regeneration terms there appers a desire for change and positive attitude towards bold ideas.

Facilities Planning Model (fpm) Scenario Testing

7.8 Based on the baseline assessment consultation and backdrop for the work of the need for significant savings a number of fpm scenarios were run to help form the options and future strategy. The full fpm reports are set out in the appendix.

7.9 The scenarios for both swimming pools and sports halls and the key outcomes and strategy implications are set out below.

7.10 **Run 1** of the swimming pools scenarios represented the strategic assessment of the current supply and demand for pools, and provided a baseline assessment of what things look like now. **Run 2** showed the position in 2027 considering the implications of population growth and new housing development across Dudley and the impact of these changes on the future demand, supply and access to pools and how this changes when compared to the baseline finding in Run 1. Run 2 also assessed the impact of the changes in the supply of pools in some neighbouring authorities.

7.11 In addition a number of scenarios were tested for swimming pools, including:

- **Run 3** - as with Run 2 (2027 population) but with a run that showed the effect of the closure of Dudley Leisure Centre and Crystal Leisure Centre, and the opening of a new facility at Brierley Hill/Stourbridge.

  Theoretically the demand which cannot be absorbed at the new Brierley Hill/Stourbridge facility is the equivalent of 2 standard pools, not taking into account the comfort factor. This scenario demonstrates the impact of a closure programme and the fact that one new centrally located facility cannot meet the swimming needs of the borough.

- **Run 4** - as with Run 3 but with a run that showed the effect of the closure of Halesowen and Haden Hill Leisure Centres and the opening of a new facility on the site of the Haden Hill Leisure Centre.

  Therefore taken together the replacement facilities at Brierley Hill/Stourbridge and the new Leisure Centre at Dudley theoretically cannot absorb the combined equivalent of about 2⅓ swimming pools because the facilities are too full. This scenario still leaves the borough short of waterspace.

- **Run 5** - as Run 4 including a run that showed the effect of the opening of a new facility on the site of the Haden Hill Leisure Centre.

  The impact of a smaller facility modelled in Run 5 is causing some 1,251 vpwpp not being able to be absorbed (being redistributed) because the facility is too full; this is the equivalent of just under 1 standard swimming pool. This scenario still leaves the borough short of waterspace.

7.12 The scenarios demonstrate the negative impact of any closure programme on access to swimming provision and the role of swimming in increasing participation. The needs and evidence illustrates that Dudley needs more not less pools. There is a theoretical demand for 5 pools so any closure programme will severely impact on the demand for waterspace.

7.13 The fpm analysis also however illustrates that there is a need for change. In 2027 swimming pools will be 12 years older and the stock by 2027 will be quite old with 4 of the 7 swimming pool sites opened on or before 1990. Also the remaining 3 sites which opened between 2000 – 2003 will be between 24 and 27 years old, so the stock is old. So there will be a need to modernise/replace some swimming pools up to 2027 and beyond. A good example is Dudley Leisure Centre which in 2027 will be 49 years old and has never been refurbished.

7.14 The fpm also concluded that the location of existing swimming pools is good. Given the relatively good accessibility of pools, accessibility is unlikely to be improved by placing new facilities at other sites. A replacement strategy would therefore appear sensible. Modernisation/replacement on the same site also offers the opportunity to increase the size of the swimming pool provision and thus provide additional pool capacity. Furthermore increased sports hall or additional hall capacity could also be developed on the same site and/or and better mix of facilities offering enhanced flexibility and greater sustainability.

7.15 Finally the fpm analysis also highlighted the potential to work strategically with neighbouring authorities to review the levels of imported demand – for example in 2027 it is estimated that 33% of swimming pool capacity is imported from neighbouring authorities, mainly (10%) from Sandwell. It concluded that joint development with another authority, the most appropriate being Sandwell should be considered.

7.16 **Run 1** of the sports hall scenarios represented the strategic assessment of the current supply and demand for sports halls, and provided a baseline assessment of what things look like now**. Run 2** the position at 2027 considered the implications of population growth and new housing development across Dudley and the impact of these changes in the future demand, supply and access to sports halls and how this changes when compared to the baseline finding in Run 1. Run 2 also assessed the impact of the changes in the supply of sports halls in some neighbouring authorities.

- **Run 3** – as with run 2 (2027 population) but with a run that shows the effect of closure of Dudley Leisure Centre, and Crystal Leisure Centre, and the opening of a new facility (Brierley Hill/Stourbridge).

  The new sports halls at Brierley Hill/Stourbridge cannot absorb the 786 vpwpp (being redistributed) because the facility is too full and a number of other facilities in Dudley also have high levels of visits which cannot be absorbed. Theoretically the demand which cannot be absorbed at the new Brierley Hill/Stourbridge facility is the equivalent of 3 badminton courts, not taking into account the comfort factor.

- **Run 4** - as Run 3 but with a run that shows the effect of the opening of a new Hall in Dudley.

  The new facility at Dudley Leisure Centre in this run also cannot absorb (being redistributed) some 730 vpwpp which is the equivalent of just under 3 badminton courts not taking into account the comfort factor. Therefore taken together the replacement facilities at Brierley Hill/Stourbridge and the new Leisure Centre at Dudley theoretically cannot absorb the combined equivalent of 6 badminton courts because the facilities are too full. This begs the question, are the replacement facilities modelled at Brierley Hill and Dudley too small?

- **Run 5** - as run 4 but with a run that shows the effect of closure of the current Sports Halls at Haden Hill and the opening of a smaller new facility on the same site.

  The major change in Run 5 was to replace the existing sports hall at Haden Hill, Sandwell with a smaller 4 court hall and in Run 4 the facility at Haden Hill was estimated to be operating at 100% used capacity. The impact of a smaller facility modelled in Run 5 is causing some 946 vpwpp not being able to be absorbed (being redistributed) because the facility is too full this is the equivalent of just under

4 badminton courts. Again this begs the question is the size of the facility modelled too small?

7.17 As with swimming pools the scenarios confirm the need to protect the existing levels of sports hall provision and access.

7.18 In order to address the issues of high level sports hall utilisation, the analysis suggests consideration should be given to; reviewing the sites with reduced public access and those halls which are excluded from the fpm modelling (on the basis of being too small) to ascertain whether any of these sites can be made available to the public. In order to relieve the pressure in terms of assessing quality, management options, programming and increasing the amount of hours available to the public in the peak period. It also suggests the need to review the options of utilising other community venues to take the pressure off the high levels of used capacity in Dudley sports halls.

7.19 Education provision and access to school sports halls is critical these represent the most modern stock across the borough and without continued and enhanced access deficiencies would be further exacerbated. The Council should seek to support the education network to enhance and maximise community use of the school sports hall stock.

7.20 As with swimming pools the need to work strategically with neighbouring authorities, in regard to sports hall provision, is also highlighted to review the levels of imported demand to ascertain whether this is sustainable and/or desirable in terms of policy.

Fpm Scenario Summary

7.21 Overall the key point from the fpm scenarios that were modelled was that Dudley starts from not having enough waterspace or sports hall space to meet demand. Pool supply is reduced in each option and so the deficit is not removed but just changes in quantity based on the differences between what is lost and replaced in each option.

7.22 Sports halls are the same with demand exceeding supply by around 8 badminton courts. So same as pools there is always a deficit it just varies in each of the options.

7.23 If Dudley is committed to delivering increases in sports participation and a healthy borough provision should be protected and ideally invested in. All the scenarios do not meet the strategic needs of the borough.

Future Strategy

7.24 Given the needs and evidence, consultation and the need to deliver within financial parameters a modernisation strategy is recommended as set out below:

- **R1** - Refurbish / upgrade Crystals in short / medium term to improve sustainability (potential long term replacement if Brierley Hill is developed)
- **R2** - Replace Halesowen with a new facility at Haden Hill in partnership with Sandwell
- **R3** - Replace the current Dudley LC with a new facility on the Dudley site
- **R4** - Develop a new facility in Brierley Hill through private sector partnership

- **R5** - The Council should seek to support the education network to enhance and maximise community use of the school sports hall stock

- **R6** – Work in partnership with relevant National Governing Bodies and clubs to deliver specialist sports needs identified

7.25 The strategy recognises the fpm findings and recommends larger pools and halls to increase capacity than were put forward in the original scenarios. The locations of the current facilities are well placed they are simply not large enough, the strategy seeks to address this. They are also old and tiered, new provision will help to support increased participation. It therefore recognises the need to replace and potentially increase the scale of provision, but recognising the financial constraints, to do this in partnership with both the private sector and neighbouring authorities.

Phase 1

7.26 Refurbish / upgrade Crystals in short / medium term to improve sustainability. Potential long term replacement if Brierley Hill is developed as a commercial proposition. May be opportunity to replace the leisure pool but this is some-way off. In the short term need for investment to support increased efficiency and sustainability of the centre and increasing the footfall. Potential exists to explore the hosting of other public sector uses.

Phase 2

7.27 Partnership project with Sandwell to provide a facility to replace Halesowen Leisure Centre (Dudley) and Haden Hill Leisure Centre (Sandwell). Capital receipt from disposal of Halesowen being contributed to project. Initial thinking is that this should be a design, build, operate, and manage (DBOM) initiative.

7.28 Suggested scale of provision:

- Pool - 8 lane x 25m main pool and keep the learner pool at 17m x 7m. Increase in size from the fpm scenarios.

- Sports hall – increase this to a 6 court hall (from 4 in the original scenarios) so 34.5m x 27m, to mitigate some of the deficit in both authorities. Deficit is not the highest in either authority in the catchment area of the Haden Hill centre. Also allows flexible use of the hall for several activities at same time.

Phase 3

7.29 Replacement of Dudley Leisure Centre on same site as part of 'hub' type of provision with other services being co-located in the same premises. LGA - One Public Estate (OPE) initiative is considered to be an option in terms of project development.

7.30 Suggested facility mix

- A main pool of 25m x 13m, 6 lanes (325 sq m) and 17m x 7m Learner Pool (119 sq m)

- Sports hall 4 court hall of 34.5m x 20m (690 sq m).

Phase 4

7.31 Brierley Hill – work with Intu (owners of Merry Hill shopping centre) to develop a commercial leisure proposition that could provide facilities in this part of the Borough. Potentially this could be some form of larger scale leisure water which influences thinking around Stourbridge and long-term future of Crystals.

7.32 Suggested facility mix will be a commercial decision and may be free form. The Council should work with partners to ensure the facility mix is as large as possible:

- Main pool of 25m x 17m, 8 lanes *(equivalent)* (425 sq m) and a 17m x 7m Learner Pool (119 sq m)

- Sports hall at least a 6 court hall of 34.5m x 27m or even an 8 court hall of 40m x 34.5m.

7.33 On an on-going basis in order to address the issues of high level sports hall utilisation, the strategy recommends consideration should be given to; reviewing the sites with reduced public access and those halls which are excluded from the fpm modelling (on the basis of being too small) to ascertain whether any of these sites can be made available to the public. In order to relieve the pressure in terms of assessing quality, management options, programming and increasing the amount of hours available to the public in the peak period. It also suggests the need to review the options of utilising other community venues to take the pressure off the high levels of used capacity in Dudley sports halls.

7.34 Education provision and access to school sports halls is critical these represent the most modern stock across the borough and without continued and enhanced access deficiencies would be further exacerbated. The Council should seek to support the education network to enhance and maximise community use of the school sports hall stock.

7.35 The needs and evidence also recommends the following strategic priorities in respect of specialist provision within the scope of the study:

- There would therefore appear to be a case for the development of a 6-rink **indoor bowls** facility in Dudley. The Council need to decide in policy terms whether they would seek to lead on such a development. Indoor bowls could feature as part of the facility mix in any new Council lead swimming / leisure centre developments. This would obviously have an impact on operation and procurement. Alternatively the Council may seek to work with partners to deliver bowls provision.

- There would not appear to be a strong case for the development of additional **indoor tennis** provision across Dudley, it is not a priority for the LTA. However if the provision of accessible indoor tennis provision is important to the Council they may decide to include 4-court provision in any new multi-sport development or alternatively seek to work in partnership with David Lloyd to increase access.

- There is a good modern supply of **health and fitness** facilities across Dudley. The market is competitive as demonstrated by the performance of the Council facilities. Any additional provision over and above the current supply should be cautioned against and should only be developed following a robust business case.

- Health and fitness provision is however a key element of delivering sustainability for any leisure centre, and would be an important consideration for any operator. Should the Council pursue a redevelopment or new provision strategy the levels of health and fitness provision should seek to replicate existing levels of provision (but high quality and purpose built)and any development over and above existing levels should be considered as part of a full business case.

- Flexible **studio space** for classes and more general physical activity session will becoming an increasingly important part of the provision picture as participation trends change. This assessment is more of a position statement and in terms of assessing future provision for studios this is best developed as part of the core business case for new provision/replacement of an existing sports hall or swimming pool, which should seek to incorporate flexible small hall / studio space as appropriate.

- Given there is the Dell stadium in Dudley and a long standing club established at the stadium then provision of **athletics tracks** is not an issue. The evidence base assessment is that the track facility does meet the needs of Dudley and plays an important role in the catchment located towards the south. The track is of good quality and the NGB support the need to ensure it has a sustainable future in line with the national strategy, which could include the development of a synthetics surface in the in-field. The focus for athletics tracks is therefore not about increased provision, but about the continued and future sustainable management operation of the existing track and engagement with club. This will be progressed in the strategy process and alongside the on-going discussions regarding the future Dell management.

- Making the Dell site more sustainable should be a key part of the future strategy. Work is on-going about the potential for a Community Asset Transfer (CAT) of the site. Alongside this it will be important to explore investment opportunities. Discussions are underway about potential investment into a 3g pitch to replace the current grass pitch. Funding through the Football Foundation would help to drive further income streams on the site and help to support the overall sustainability.

- Protection and enhancement of the existing **gymnastics** facility at Earls provides the way forward.

- Protect current **cycling** provision at Halesowen Athletics and Cycling Club. Potential to consider closed road circuit as part of any new multi-sport provision.

Opportunities should be explored and delivered on an on-going basis over the life of the strategy in partnership with NGBs and clubs.

Delivering the strategy

7.36 This section sets out indicative business plans for the proposed strategy set out. The analysis includes indicative levels of income and operational costs, lifecycle costs and also debt finance costs. Some of the developments fall outside the direct control of the Council, and we have provided a commentary on the relevant item where appropriate.

7.37 As a starting point in developing the financial implications of the Council’s facility plans we have set out a summary of the strategy:

- Improve the efficiency of the Crystal Leisure Centre

- Contribute to a new Leisure Centre in Sandwell on the Hadden Hill site

- Construct a new leisure centre at Dudley

- Support a new commercial leisure facility at Brierley Hill
- Transfer The Dell Stadium to the Community under an Asset Transfer.

Current Direct Cost of the Service (2013/14)

7.38 The current cost of the facilities, which at the time of writing is the actual 2013/14 figures was £1.892 million although this has fallen to circa £1.7 million in the current year. The table below sets out the net direct cost for each facility.

Table 7.2: Summary of the Net Direct Cost of Facilities

	All	Crystal Leisure Centre	Dudley Leisure Centre	Halesowen Leisure Centre	The Dell Stadium	Recreation
Income	2,583,602	1,282,265	587,316	663,935	48,553	1,533
Expenditure	-5,948,095	-2,299,740	-1,492,430	-949,471	-212,414	-994,040
Net Cost of Service	-3,364,493	-1,017,745	-905,114	-285,536	-163,861	-992,507
Less:						
Central Recharges	732,554	20,700	5,000	7,500	7,800	691,554
Department Recharges	540	190	160	30	160	0
Capital Charges	739,069	250,710	417,579	57,470	12,760	550
Net Direct Cost of Services	-1,892,330	-745,875	-482,375	-220,536	-143,141	-300,403

7.39 In the previous sections of this report, the savings generated from outsourcing the service to a charitable trust were estimated at £194,000 which included circa £350,000 of VAT and NNDR savings, increases in income and efficiencies in operational costs, reductions from the management cost centre, off-set by provisions for overheads and profit, increased cost provisions including maintenance and marketing costs.

7.40 Within this section, we have sought to include all the VAT and NNDR savings, management cost savings increases in operational costs etc. into the new business plans and adjustments to current costs.

7.41 It should be noted that the business plans assume that for the new facilities at Dudley and Haden Hill will perform significantly better than the existing facilities which is customary for new facilities replacing older sites. We have also assumed that the maintenance provision that sits centrally will remain intact to support the new buildings.

7.42 The remainder of this section covers:

- Efficiency Review / upgrade of Crystal Leisure Centre
- New Leisure Centre – Dudley
- New Leisure Centre – Haden Hill
- New commercial Leisure Centre at Brierley Hill

- Community Asset Transfer of The Dell Stadium
- Summary of Capital Costs and Net Operating Income.

Key Assumptions used in Business Planning

7.43 The following assumptions have been used when developing these indicative business plans:

- The facilities will be operated by an operator who used a charitable vehicle to provide the leisure services
- Full discretionary rate relief is provided to the operator
- A Design, Build, Operate and Main contract is used to build and operate the facilities
- No inflation has been applied to the business plans
- No debt costs are included in the business plans
- No phasing assumptions are made in the business plans

New Leisure Centre – Dudley

7.44 Current thinking is that the new leisure centre at Dudley will be built adjacent to the current facility closer to the road enabling some development elsewhere on the site, which may be other public sector users (a public sector hub) and/or housing.

7.45 The new facilities to be incorporated for the site have been developed from demand and supply analysis shown earlier in this section.

Table 7.3: Facility Mix for the new Dudley Leisure Centre

	Current	Planned	Remarks
Swimming Pool	25m x 5 lane	25m x 6 lane	
Learner Pool	10m x 5m	17m x 7m	
Sports Hall	4 courts	4 courts	
Fitness Suite	80 stations	50 stations	Insufficient demand for 80 stations
Studio	Two	Two	
Activity Hall	4 courts	No	5 aside football

Summary of Income and Expenditure

7.46 The table overleaf sets out a summary of the management fee that would be required for the new facility.

Table 7.4: Facility Mix for the new Dudley Leisure Centre

All £	Year 1	Year 2	Year 3	Year 4
Dry Side Income	75,674	85,133	94,592	94,592
Health and Fitness Income	280,901	308,946	330,587	340,857

All £	Year 1	Year 2	Year 3	Year 4
Swimming Income	291,755	297,590	303,542	303,542
Other Income	-	-	-	-
Catering and Retail.	84,167	90,720	96,560	96,560
Total Income	**732,497**	**782,389**	**825,281**	**835,551**
Employee Costs	(701,064)	(701,064)	(701,064)	(701,064)
Premises Costs	(317,095)	(331,795)	(340,795)	(340,795)
Other costs	(118,602)	(97,638)	(101,203)	(101,409)
Overheads and Profit	(156,712)	(162,352)	(166,545)	(167,161)
Operator Surplus/(Cost)	**(560,975)**	**(510,459)**	**(484,326)**	**(474,877)**

7.47 The current net direct cost of the facility is £482,000 per annum which is similar to the projected management fee payment to the DBOM operator. However, within the new business plan there are additional costs that are not currently accounted for in the existing profit and loss account, including building lifecycle provision, equipment lifecycle provision and leasing costs for the health and fitness suite totalling circa £160,000 per annum. We have also increased maintenance costs to national benchmarks.

7.48 In terms of income, this is higher than current income levels, and it is very common on new build DBOM leisure centres for income to increase, especially swimming and fitness. We have increased income but these are still under national benchmark levels, which is mainly due to the lower than average prices set. It may be that income on both swimming and fitness will increase with further sales of memberships and swimming lessons, but the projections used in the model reflect a prudent but reasonable level of income compared to current levels based upon a high level review but these will be refined at the next stage of the process, the Outline Business Case for investment.

7.49 A quick summary of the outputs of the business plan include:

- Income per court is £23,000 which includes the average court income plus the 5 aside income will fall into the main hall

- Income for health and fitness, measured by fitness station, suggests that this is just under £7k per station and although reflects the traditional 20 members per item of equipment, the price point for membership is low and we also note that in some areas, operators are increasing membership to over 30 members per station, but we see this as a substantial uplift from the current position, and not detailed market analysis has been undertaken

- Swimming income is measured by the amount of income per m2 of pool water and we note that most operators are now over £1,000 per m2, some at £1,300 per m2. We understand that the average in our database is circa £850 per m2. The income in the new Dudley Leisure Centre business plan is £683 per m2 of pool water, which is low. However, it is substantially higher than current income levels, and we would expect to see increased swimming income from a new site, especially swimming lessons, we feel the increase we are projecting is high as we can go, reflecting a prudent position and without any detailed demand analysis being undertaken. We have assumed only 341 in swim school, whch is low for the amount of water space, but only £64k is being generated currently from swim school.

7.50 The projections above, also exclude the net capital costs of the new facility that will be financed from debt and have been included in the overall cashflow model. The capital costs have been taken from the Affordable Sports Centre guidance from Sport England

(Option 4) but we recognise that we have not included inflation but likewise demand for market share in the leisure contracting market is also suppressing construction prices.

7.51 We have also included a capital receipts from land disposal on the leisure centre site of £0.5 million and £250k of demolition costs.

New Leisure Centre at Hadden Hill

7.52 Discussions have taken place between Sandwell and Dudley Council's with the agreement in principle that a new facility should be constructed on the existing leisure centre site at Hadden Hill in Sandwell. For the purposes of this report, this project is seen as a jointly funded leisure centre with any operating surpluses and operating risks shared equally. It is likely that for practical and geographical reasons, the facility will be operated under contract with Sandwell Council.

7.53 Current thinking is that the existing Halesowen Leisure Centre will be demolished and sold for a capital receipt which will be invested into the new facility. The new leisure centre will incorporate the following facility mix.

Table 7.5: Facility Mix for the new Dudley Leisure Centre

	Current Halesowen	Current Hadden Hill	Planned New Facility	Remarks
Swimming Pool	25m x 6 lane	25m x 4 lane	25m x 8 lane	
Learner Pool	15m x 9m	20m x 8m	17m x 7m	
Sports Hall	0	6	6 courts	
Fitness Suite	70	47	80 stations	
Studio	3	2	2	
Squash	3	1	0	

Summary of Income and Expenditure

7.54 The table below sets out a summary of the management fee that would be required for the new facility.

Table 7.6: Facility Mix for the new Haden Hill Leisure Centre

All £	Year 1	Year 2	Year 3	Year 4
Dry Side Income	87,597	98,546	109,496	109,496
Health and Fitness Income	521,693	585,468	638,742	660,682
Swimming Income	584,881	596,579	608,511	608,511
Other Income	-	-	-	-
Catering and Retail.	145,003	155,892	165,528	165,528
Total Income	1,339,173	1,436,485	1,522,277	1,544,216
Employee Costs	(749,408)	(749,408)	(749,408)	(749,408)

All £	Year 1	Year 2	Year 3	Year 4
Premises Costs	(347,319)	(362,019)	(371,019)	(371,019)
Other costs	(160,116)	(142,199)	(148,461)	(148,899)
Overheads and Profit	(222,822)	(231,307)	(238,075)	(239,391)
Operator Surplus/(Cost)	(140,492)	(48,448)	15,314	35,499

7.55 It can be seen that this facility is projected to operate at a small operating surplus of £35,000 by Year 4, although in the earlier years it may operate at a deficit whilst sales increase and income matures. These figures include the operators leasing costs, equipment replacement programme and building and plant replacement provisions. We anticipate the DBOM contract to be 25 years.

7.56 It should be noted that the figures above have been calculated around benchmark levels of income and costs, given that there is two facilities closing and one new facility replacing these. It should be noted that at the next stage (*Outline Business Case*) further detailed analysis will need to be undertaken on the pricing, programming, current performance of both sites and projected demand in order to calculate a more accurate picture of what a DBOM operator may need or can pay the Council's for the new facility.

7.57 A quick summary of the outputs of the business plan include:

- Similar prices have been used to Sandwell and Dudley
- Income per court is £18,250 which is marginally above the benchmark level for this type of income
- Income for health and fitness, measured by fitness station, suggests that this is just over £8,200 per station. We have assumed 80 stations at 25 members per station resulting In circa 2,000 members. The operator may be able to increase this to over 30 members per station or 2,400 members although it should be noted that we have not received any detailed market analysis relating to health and fitness (e.g. latent demand report)
- Swimming income is measured by the amount of income per m2 of pool water and we note that most operators are now over £1,000 per m2, some at £1,300 per m2. We believe with the 8 lane pool and large training pool that we can leverage circa £1,200 per m2 of pool water. We have assumed 1,036 in swim school.

7.58 We have included over £200,000 of leasing and lifecycle costs into the business plan that do not exist in the current plan. However this will keep the new facility maintained correctly and will optimise income in the future.

7.59 We have assumed that the two Council's will share the capital costs and the net operating costs and income equally.

7.60 The capital costs for this scheme are circa £8.917 million as set out in the Affordable Sports Centre publication from Sport England. We have also included £250,000 for demolition and also £0.5 million of capital receipts from the existing Halesowen site, which will go into the capital funding of the scheme.

Efficiency Review of Crystal Leisure Centre

7.61 It has been agreed that this existing leisure centre is likely to remain in the medium term, but may be dependent upon the delivery of new facilities at Brierley Hill. As stated in this report, this facility is actually the most expensive to operate at circa £745,875 per annum (Actual 2013/14) before central costs and debt. We have used 2013/14 as the project started in 2014/15 and this was the most recent actual information, and as the financial data used in the earlier part of the report related to 2013/14 actual we have continued to use this information for consistency. Although this may not now fully reconcile with the current budgets.

7.62 Considerations for relocating library services from the Crowne Centre may improve efficiency if the library could be accommodated within the existing leisure centre. Consideration of a number of efficiencies have been made in order to reduce the Net Direct Cost of the site and these are summarised below.

7.63 We have calculated the likely savings for the Council on outsourcing the Crystal Leisure Centre to a charitable leisure operator. These benefits in the other facilities are included in the individual business plans (e.g. Dudley and Halesowen).

Table 7.7: Impact of Outsourcing to Charitable Operator

	£
Current Net Direct Cost	745,875
NNDR Savings	-84,309
Increase in Income from VAT	-202,249
Irrecoverable VAT	63,320
Profit for Operator	74,226
Central Overhead Recovery for Operator	44,535
Inrease in Maintenance Costs	107,661
Increase in Marketing Costs	30,774
General Efficiencies	-107,006
Savings in Utility Costs	-49,742
Debt Cost for New Equipment	65,000
Projected Management Fee	688,085

7.64 It can be seen that after all the adjustments, a comparison with the Net Direct Cost of the leisure facility of £745,875 shows a saving of circa £122,000 but the operator will need to also incur capital investment which will increase the cost of the management fee. We have estimated that this capital investment for new gym equipment, a deep clean and other general new equipment for swimming and sports hall will total £366,000 which writing out over 7 years would add a further £65,000 to the management fee resulting in a management fee of circa £688,085 per annum a saving compared to the 2013/14 cost of circa £58,000 a year.

7.65 This small saving is suppressed by the increase in provision made for maintenance which based upon the 2013/14 figures was low compared to benchmark provision. However, it is recognised that in the earlier part of the report, the central provision for maintenance of £210,000 was reflected in the net adjustment to the overall savings in outsourcing the service. For the review of this site only, we have left the corporate provision is the Council's budget.

New Commerical Leisure Centre at Brierley Hill

7.66 We understand from the Council that there have been discussions on the development of the Brierley Hill site with the Shopping Mall owners INTU. Discussions have covered a range of activities, but one of these considerations is for a new regional water based leisure facility. We further understand that this would be operated by a commercial operator and would not fall under the Council.

7.67 If these scheme were to proceed, the Council may consider the relocation of the Crystal Leisure Centre and provide a new facility in Halesowen, which would be more cost effective and likely to provide a standard pool with fitness etc.

7.68 It is too early to establish the impact of this facility on the other leisure facilities, but the data suggests that increased water provision is required in the borough and would not adversely impact on the other leisure centres if they operated at national benchmark levels.

Community Asset Transfer of The Dell Stadium

7.69 The current facility operates at a circa £150,000 deficit, but we understand that the potential inclusion of a new 3g artificial turf pitch may leverage increased revenues which will likely reduce the operating deficit to a negligible sum. Clearly discussions on the level of post transfer support (in time and costs) will need to be considered, especially the lifecycle replacement costs of the asset.

7.70 We have been advised to assume that the facility will transfer and the impact on the future Council budget from this facility will be nil.

Departmental Management Overheads

7.71 As previously mentioned earlier in this report, the financial model includes a cost centre called “Recreation” that holds the management costs of the Sports and Physical Activity Section in the Council. The Net Direct Cost of this service area is £300,403 per annum. This includes 6 posts covering the senior management as well as support costs including marketing, training, membership direct debit collection etc. These costs are detailed in the table below.

Table 7.8: Employee Costs associated with Recreation Cost Centre

Position	Actual 2013/14 £	Retained %	Retained £	Notes
Head of Service	54,120	100%	54,120	Retained within Council
Operations Manager	41,173	100%	41,173	Retained for Contract Monitor
Training & Dev Officer	25,707	0%	0	Transfer
Promotions Officer	17,980	0%	0	Transfer
Membership Administrator	15,598	0%	0	Transfer
Casual Training Assessor	471	0%	0	Transfer
Sub Total	155,049		95,293	
Weekly Wages	141		0	
Total Basic Salary	155,190		0	
Overtime	351		0	
National Insurance	12,320		7,565	
Superannuation	24,893		15,285	

Position	Actual 2013/14 £	Retained %	Retained £	Notes
Grand Total	192,754		118,143	

7.72 As part of any transfer of services, we have assumed that the Council will reduce the cost of management from the £300,403 down to £150,000 to cover the retained emloyees and provide some budgetary provision for other expenditure (IT, supplies and services etc.) WE have anticipated that this will be completed by 1st April 2017.

Maintenance Provision

7.73 We understand that as part of the central recharge of £557,000 there is £210,000 allocated for maintenance. We have not included this in our projections, although it would match the additional maintenance (building and equipment lifecycle) that we have included in the future projections post contract signature.

Summary of Capital Costs and Net Operating Income

7.74 This section has considered the replacement of facilities at Dudley, the transfer of the Dell Stadium to the community, the creation of new private sector leisure facilities at Brierley Hill and a new leisure centre procured as a joint venture project with Sandwell Council.

7.75 Business plans have been created for a number of these facilities, as well as the capital costs. We have sought to capture the financial impact of this new strategy and compare it against the current cost of provision, and these are detailed in the Appendix. The cashflow model assumes the following key timings.

Table 7.9: Cashflow Key Timings

Green Light to Procure by Councils	1st April 2016
Procurement Process using DBOM	18 months
Contract Sighted and Service & Construction Starts	1st Oct 17
Construction Periods	18 months
Facilities Open	1st April 2019
Contract Period from Contract Signature	25 years

7.76 From discussion with the Council, we have assumed that this will be a Design, Build, Operate and Maintain (DBOM) contract which has been used in other authorities in the Black Country, including Wolverhampton and Sandwell. It can be seen that following the green light next April (2016), the contract would start in October 2017 and the new facilities would open in April 2019 for a period of between 15 and 25 years.

Table 7.10: Summary of Net Capital Costs

All £'000	New Dudley Leisure Centre	New Hadden Hill Leisure Centre
Capital Costs	7,897	8,917
Demolition	250	250
Equipment	251	264
Capital Receipts	-500	-500
Net Capital Costs	**7,898**	**8,931**

7.77 The debt costs associated with these capital levels will be circa £734,000 based upon 25 years at 3% using an annuity profile. The table below sets out a summary of the profiled capital investment and capital receipts relating to the strategy.

Table 7.11: Capital Costs and Receipts

Year Ending DBOM Operational Year	Mar – 17 £	Mar - 18 £	Mar- 19 £	Grand Total £
CAPITAL INVESTMENT				
New Haden Hill Facility	-3,269, 580	-6,261,789	600, 084	-8,931,285
New Dudley Leisure Centre	-2,895, 571	-5,566,138	563,478	-7,898,231
SHARE OF Existing Haden Hill Leisure Central	1,447,785	2,783,069	-281,739	3,949,116
				0
Annual Totals	-4,717,366	-9,044,858	881,823	-12,880,401

7.78 The capital costs have been established from the Sport England guidance called Affordable Sports Centres (Options 4 & 5) and we have made an adjustment for a contribution from Sandwell Council for the new Haden Hill facility. For clarity we have set out below the details of the capital costs and funding of each site.

Table 7.12: Post Contract Cashflow

Year Ending DBOM Operational Year	Mar – 20 Year 1 £	Mar - 21 Year 2 £	Mar - 22 Year 3 £	Mar -23 Year 4 £	Mar - 24 Year 5 £
Management Team	-150,000	-150,000	-150,000	-150,000	-150,000
Leisure Corporate Maintenance Provision		0	0	0	0
Management Fee for Dudley Leisure Centre	-560,975	-510,459	-484,326	-474,877	-474,877
Management Fee for Haden Hill Leisure Centre	-140,492	-48,448	15,314	35,499	35,499
Share of Management Fee for Haden Hill	70,246	24,224	-7,657	-17,750	-17,750
Transfer of The Dell Stadium to Community	0	0	0	0	0
Outsource Crystal Leisure Centre to Operator	-688,085	-688,085	-688,085	-688,085	-688,085
Net Operating Position	-1,469,306	-1,372,768	-1,314,754	-1,295,213	-1,295,213
Add: Debt Costs	-739,694	-739,694	-739,694	-739,694	-739,694
Revised Cost to Council	2,209,000	-2,112,462	-2,054,448	-2,034,907	2,034,907
Savings	-316,670	-220,132	-162,132	-142,118	-142,577

7.79 We anticipate that the management costs will be reduced by 1st April 2017 from £303,000 to £150,000 per annum. The management fee payments/receipts for the new Dudley and Haden Hill DBOM facilities will come on line on 1st April 2019, but we have made an adjustment for the sharing of the costs and savings of the Haden Hill facility (50:50).

7.80 When the DBOM contract is signed and the operator takes over the facilities in October 2017 they will continue to operate the existing facilities including the Crystal Leisure Centre. We have calculated the savings that will accrue on this site from the transfer of the facility to the DBOM operator. These are detailed earlier in this section.

7.81 We have also added the debt costs to the revised operating costs incurred by the DBOM operator and compared these revised costs to the Council with the current Net Direct Costs of £1.892 million. It can be seen that the ongoing savings in Year 4 onwards is £142,577 but if the Council includes the £210,000 maintenance provision (if it is available to leisure) then this will become a saving of circa £67,000 per annum.

7.82 From an operational perspective, without the debt costs, the strategy leverages savings of circa £600,000 per annum.

Way Forward / Next Steps

7.83 The strategic position is therefore clear; deficiency in water and hall space and an increasingly ageing, less attractive, stock of buildings. This is impacting on an already low level of participation across the borough set against the councils desire to increase participation and tackle serious health issues. Achieving a zero subsidy by March 2018, given the nature of what the council currently operate, is particularly challenging. It is also recognised that the development of any future project would have implications in terms of capital financing

7.84 The new strategy as set out in 7.24 leverages circa £500k of savings, significantly increased participation *(anticipated)* from new facilities in line with health and participation aspirations of the council and the stock will be in a much better condition with less risk to the Council in terms of building and plant failures.

7.85 However the down-side is the capital costs or more specifically the debt costs associated with the strategy are £200k more expensive than the savings above, which will not address the proposed savings in operating costs for the Council.

7.86 There are a number of possible issues that may address this shortfall or even reduce the , but are not quantifiable at this stage, which include:

- The outsourcing to an operator may leverage more savings that we have projected, especially at Dudley (PfP suggest that in other cases they have got the management fee down to zero, if the debt costs are picked up by the Council)

- Leveraging increased capital values from the sites, or including more capital funding into the project from the Council's capital receipts or reserves than anticipated in the current financial models (if there are any)

- Despite needs and participation issues, accepting the need to close at least one of the sites (possibly Crystal) given its operating costs.

7.87 Under the procurement regulations councils are now encouraged to speak with the market, so one way forward could be to speak with PfP who are providing similar facilities in the area to work with the council and perhaps work on a business plan for the Dudley sites.

7.88 It is accepted that externalisation to a third party operator (as suggested in the options appraisal and reiterated above) would require a condition survey of the leisure centres to enable the Council to be clear about the issues associated with each one. The Council would then need to directly address the issues or accept that any operator would include a cost for rectifying the issues.

7.89 A key starting point is therefore the need to understand the detailed conditions of the buildings. Given that Crystal Leisure Centre has the most pressing problems at this point in time it is suggested that a condition survey is carried out on this facility first. Halesowen and Dudley would then follow to enable a complete picture for consideration.

7.90 In line with the needs and evidence and recommendations the Council are already in the process of exploring building related issues with Corporate Landlord, particularly related to Crystal Leisure Centre, where the cost of maintenance and repair/replacement is beginning to place particular strain in the corporate budget. Boiler units have been condemned or are about to fail and issues associated with some of the concrete structure have recently been identified. There are also some big issues at other centres; roof at

Dudley Leisure Centre and AHU at Halesowen Leisure Centre, which would cost in excess of £1m to address with no great impact on the customer experience.

7.91 The prioritisation of projects has therefore been agreed as follows; 1) Halesowen/Haden Hill, 2) Dudley 3) Crystal. To support delivery it is suggested that in the first two instances the value of the asset is identified at a corporate level, rather than being ring-fenced as a straight line contribution to a future project, as this potentially levers greater resource through the existing LLP arrangement and may reduce the borrowing requirement.

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