

THE EXECUTIVE

7 OCTOBER 2003

REPORT FROM THE DIRECTOR OF LEISURE AND ENVIRONMENTAL SERVICES

FUTURE OF LEISURE CENTRES: LEISURE FACILITIES NEEDS ASSESSMENT		FOR DECISION
<p><i>This report covers the setting of policy which is reserved to the Executive</i></p>		
<p><u>Summary</u></p> <p>Following the undertaking of a number of consultancy studies into the provision of Leisure Centre Services in Borough, which includes the demands and needs analysis of the Boroughs population based upon demographic information, a long-term plan has now been compiled.</p> <p>This report provides information with regard to provision of the leisure centres now and into the future and also outlines aims and policies for officers to work with to achieve this.</p>		
<p><u>Recommendation</u></p> <p>The Executive is recommended to agree that the objective is to provide good quality, efficiently run Leisure Services which meet the needs of local residents and visitors to the Borough and accordingly agree the aims and policies as set out in Appendix A and to set the levels of provision recommended in section 7 as the basis for service planning.</p>		
<p><u>Reason</u></p> <p>To assist the Council in achieving the Community Priorities of <i>“Promoting Equal Opportunities and Celebrating Diversity”, “Better Education and Learning for All”, “Improving Health, Housing and Social Care”, “Raising General Pride in the Borough” and “Regenerating the Local Economy”</i>.</p>		
<p><u>Wards Affected</u> - The entire Borough.</p>		
Contact: Allan Aubrey	Head of Leisure & Community Services	Tel: 020 8227 3576 Fax: 020 8227 3129 Minicom: 020 8227 3034 E-mail: allan.aubrey@lbbd.gov.uk

1. Introduction

- 1.1 Since the original Needs Assessments of Leisure Facilities (McAlpine, Thorpe and Warrior) was conducted in 1999, a number of factors have to be taken into consideration. The Leisure & Community Services Division, working alongside Consultants (PMP), have updated the Borough's needs for leisure provision.

1.2 This Needs Assessment covers the following Sports and Leisure Facilities:

- Swimming Pools
- Health and Fitness Gyms
- Sports Halls
- Squash Courts
- Synthetic Turf Pitches

1.3 Within the Needs Assessment exercise, a full audit of all facilities within the Borough, and those in neighbouring authorities that impact on the Borough has been conducted. This includes Abbey Sports Centre, Dagenham Swimming Pool, and Wood Lane Sports Centre. Also in the Borough there are three dual use centres, Barking Abbey School Leisure Centre, Sydney Russell Leisure Centre, Warren Sports Centre and Robert Clack Sports Centre (anticipated opening in Jan 2004).

1.4 The outcome of the Needs Assessment study provides details of the leisure/recreational needs for the Borough for the next decade.

2. Strategic Context

2.1 In order to assess future requirements and to plan for the future research has been undertaken on a number of factors that potentially impact on service provision. These areas include:

- Local Demographic profiles
- Government Initiatives / Agendas
- National Sporting Bodies Plans
- Potential of London hosting the 2012 Olympics.

2.2 The findings of the feasibility study conducted by McAlpine Thorpe and Warrior in 1999 related to the development options for Dagenham Swimming Pool were also taken into consideration.

2.3 The complete report with details of all the Strategies relevant to this study by PMP is attached to this report (Appendix B).

2.4 Set out below are the major issues that impact on Barking and Dagenham.

2.5 The Government has laid down a number of crosscutting agendas which stress the importance of the provision of good quality and accessible facilities that will greatly assist in addressing.

- Young People
By providing services designed to appeal particularly to the 16 – 24 age group who are at particularly at risk of exclusion.
- Social Inclusion
By providing activities for people on low income, unwaged, members of ethnic minorities and others at risk of exclusion

- **Community Safety**
By providing diversionary activities for those at risk of becoming involved in criminal or anti-social behaviour and providing welcoming community space for members of the community to meet in safety
- **Lifelong Learning**
With the provision of informal learning spaces as well as a formal programme of life-long learning opportunities
- **Growth**
Finally, although not specifically a Government Agenda, the Borough is and will continue to be subject to regeneration, which includes increasing the population not only within the Borough but close to its boundaries. With an increase in the population, there will be an increase in demand for use of existing facilities and it highly likely that more facilities will be required to accommodate the needs of the community. Any additional facilities as a result of growth will be considered as part of the overall regeneration package and could not necessarily be funded by the Council.

2.6 Game Plan: A Strategy for Delivering Government's Sport and Physical Activity Objectives (2003)

This strategy was commissioned by the Government to assess how it could play a part in increasing participation and performance in sport. One of the recommendations, which is particularly relevant to Barking and Dagenham, is:

- **Grassroots Participation**
A wide range of initiatives are needed to encourage participation, particularly for the disadvantaged groups i.e. young people, low wage earners, woman and older people

Other recommendations from this report are:

- **High Performance Sport**
Improved development of talented sportsmen and women to allow them to reach the highest levels
- **Mega Sporting Events**
A Clear assessment of the benefits is needed
- **Delivery**
Re-evaluation of Government Finances is required. Less money should go to the bureaucrats and more to the end user.

The Governments main agenda is to increase participation levels of all people, with a particular focus on developing participation amongst the most economically disadvantaged groups in society.

2.7 The Amateur Swimming Association (ASA) National Facilities Plan (2002).

Within this plan, the ASA has set out a strategic network of facilities to help guide local authorities to make decisions when looking to locate new facilities and/or invest into new and existing facilities.

Barking and Dagenham is currently not listed within this plan, as the Borough does not have a swimming facility that meets the desired criteria, which is a 25 metre, 6 Lane pool, but a 25-metre 8-lane pool is preferable. The nearest 8 lane pools are at Edmonton and Barnet.

The ASA has set out a strong recommendation for every local authority to have at least, a 25-metre 6-lane competition pool.

2.8 Testing the Waters: The Sport of Swimming.

This report was conducted by the House of Commons Select Committee (January 2002) and was based on the existing provisions of swimming facilities within the Country at that time.

In brief the outcome of this report concluded that: -

- there is sufficient evidence to suggest that in England, the existing pools are struggling to meet the needs of the wide variety of users.
- there is severe shortage of 50 metre competition class pools.
- an objective should be set to have at least one 25 metre 8 lane competition pool in each county.
- there should be an increase in the number of 50 metre pools in line with the provision of other comparable countries.

Both the ASA and the Institute of Sport and Recreation Managers (ISRM) recommend that flexibility should be built into the design of all pools to allow maximum use by the whole community, i.e. moveable floors, bulkheads, booms etc.

2.9 Summer Olympics 2012.

Although as yet it would be fair to say that the sites for the main facilities will not be within the Borough, the proximity of Barking and Dagenham to the Lower Lea Valley will mean that the Borough could have a potential role to play in numerous support facilities.

Key criteria of all facilities developed will include ensuring that they provide a lasting and sustainable legacy for London and that they provide a catalyst for regeneration.

3. Current Sporting Trends

3.1 As well as the Government's and the National Sporting Bodies Agendas and Plan's further analysis has been conducted to assess the current trends. This provides a basis for determining the future demands for leisure facilities.

3.2 Full details of this study can be read in PMP Report (Appendix B). However, the salient points have been highlighted below.

3.3 Health and Fitness continues to be an expanding market and saturation within the next 4 years is unlikely. In fact in the future there will be a need to target the growing market of the over 55's which will represent a new market and potential further growth.

- Game Plan (Department of Culture, Media and Sport, 2003)
- Mintel (1999) Health and Fitness Report
- Leisure Database Company State of the Industry Report 2003 (from Leisure Report, January 2003)

3.4 Within Public Leisure facilities, the following findings have been made:

- Admissions have increased by an average of 3%.
- Approximately one in five consumers or their families visit a leisure centre once a week or more.
- In the past five years the cost has increased much faster than the retail price index, meaning that relative to other goods and services it has become much more expensive.
- Leisure facilities built within the 1960's and 70's have suffered from a chronic lack of investment.
- Refurbishment or redevelopment of these facilities should be a priority.
- The switching of DSO Operations into Not for Profit Trust and Companies limited by guarantee has the potential to offer local authorities cost reduction benefits.

4. Demographic Analysis

4.1 The following table presents an analysis of the demographics of Barking and Dagenham according to the 2001 Census. This provides a summary of the local market, which is an important consideration in the future of leisure provision within the Borough.

	Borough	Significance
Population	<ul style="list-style-type: none"> • total population of 163,944. 48% of the population is male and 52% female • there is a higher than average proportion of people aged under 16, 16 to 19 and 20 to 29 and, thus, a lower than average proportion over 30 	<ul style="list-style-type: none"> • Barking and Dagenham, although lower in population compared to other outer London boroughs, has a high population density and a large potential market • there is a young population and this section of the population tends to have higher levels of participation in sport

Ethnic Origin	<ul style="list-style-type: none"> 85.2% of the population is white compared to a national average of 90.9 % there is an above average proportion of ethnic minorities, especially Pakistani, Caribbean and African 	<ul style="list-style-type: none"> the specific needs of the ethnic minorities must be taken into account in the provision of leisure facilities to facilitate participation from these groups
Economic Activity	<ul style="list-style-type: none"> the percentage of unemployed people is higher than average at 4.5% compared to the national figure of 3.4% 	<ul style="list-style-type: none"> there is a higher level of unemployment, indicating the need for affordable sports and leisure facilities
Mobility	<ul style="list-style-type: none"> the population's mobility levels are lower than average with 37.9% of the population (compared to 26.8% nationally) not having a car and 17.1% (compared to 29.4% nationally) having two or more cars. 	<ul style="list-style-type: none"> mobility is below average, which emphasises the need to ensure that the facilities are well served by local public transport.

4.2 Further work has been conducted to assess the potential profile of Sport and Leisure for Barking and Dagenham analysing the tendencies of residents to take part in some of the main sports and leisure facilities. The following findings were made:

- In terms of the sports cover, only in football did the Borough's residents demonstrate a higher than average desire to take part.
- The residents have a lower than average desire to take part in swimming, squash and health and fitness.
- The percentage of the population that does not take part in any sport is above average. 38.7% for the Borough compared with 35.4% nationally.
- One of the reasons why residents are less inclined to take part could be reflective of the condition of some of the facilities in the Borough.

4.3 In addition to the above, there is also growth projected in the population as a result of the forthcoming developments in the Borough, including at Barking Reach and South Dagenham. It is anticipated that to cater for this growth the Council needs to adopt a strategy through the Town and Regeneration Planning process to ensure the provision of suitable and additional leisure facilities. One of the ways that this can be achieved is by the prudent use of Section 106 Agreement to secure funding to provide such facilities.

5. Demand Modelling

5.1 As the final part of this study, a full facility audit has been conducted. The audit covers the facilities listed below within the Borough and all other facilities within a three-mile radius. The full results can be read in the full PMP Report (Appendix B).

- Swimming Pools
- Sports Halls
- Health & Fitness Gyms
- Squash Courts
- Synthetic Turf Pitches

5.2 Of all the facilities listed, the demand for facilities is detailed below.

Swimming Pools

The demand assessment for the Borough and surrounding areas shows an oversupply of swimming pools of 1,280m² now and 1,232m² in 2005

Sports Halls

The demand assessment for the Borough and surrounding areas shows an unmet demand now (114 courts) and in the future (between 88 and 100 courts)

Health & Fitness Facilities

The demand assessment for the Borough and surrounding areas shows a large undersupply of health and fitness facilities. (At present 69 stations and in the future 65 stations)

Squash Courts

The demand assessment for the Borough and surrounding areas shows an unmet demand now (61 courts) and in the future (61 courts)

- 5.3 Although the facilities audit has been made on the current population, the regeneration within the Borough and the neighbouring Thames Gateway area will increase demand. The regeneration polices will therefore need to take into account the need to build and provide further sport and leisure facilities, both formal and informal.
- 5.4 Coupled with the above policy on regeneration the Council should adopt a policy ensuring greater community use of school facilities. This is strongly recommended and endorsed by Sport England and is one of the criteria of Lottery funding.

6. Financial Implications

- 6.1 There will be Capital and Revenue Implication of delivering the aims and policies set out in this report. These will need to be considered in the context of the Councils overall planning process and assessed against the overall demands for the available resources.

7. Conclusion

- 7.1 Having drawn together information from a variety of sources it is quite clear to see that if the Borough wishes to continue to develop and support the Community the following sporting facilities will be required to meet the future needs:

- As has already been identified in previous studies Dagenham Swimming Pool should be replaced. Even though currently there seems to be an over supply, with the demise of the UEL site and the possible impact of the Olympic bid a new facility in line with the ASA recommendations is advised.
- Along with Swimming Pools, Sports Halls are the most popular facility within Local Authority Centres. There is also an unmet demand within the Borough, therefore the borough should look to provide further facilities
- There is currently an unmet demand for Health & Fitness Facilities within the borough. To meet demand, the borough should look to increase and improve the number of existing facilities.
- There is an unmet demand for Squash Courts therefore the Borough should aim to at least maintain the quality and standard of the current provision
- As football demand within the Borough is higher than the national average the Council should look to increase the Service provision of quality synthetic turf pitches.

7.2 Finally, it should also be noted that as the Borough has a higher than average level of deprivation at present many of the facilities, particularly those operated by the private sector remain inaccessible to a large sections of the community. Therefore careful consideration should be made when pricing the costs of activities/facilities. In addition, there needs to be a greater encouragement of the private sector to provide discounted rates for facilities.

8. **Consultation**

The following people have seen this report and are happy with it as it stands.

Education Arts and Libraries
 Roger Luxton, Director
 Fiona Bevan, General Inspector-Physical Education

Corporate Strategy:
 Jeremy Grint, Head of Regeneration,
 Bill Coomber, Corporate Equalities and Diversities Advisor

Finance
 Julie Parker, Director of Finance
 Laura Williams, Acting Head of Finance LESD

Leisure and Environmental Services
 Gordon Glenday, Head of Interim Statutory Planning Division.

Background Papers

- Testing the Waters
www.parliament.uk/about/select/committee

- Reports by McAlpine, Thorpe and Warriar (consultants employed by the Council to investigate the options) entitled - Future Funding of Barking and Dagenham Leisure Services and Comparison of Long Term Costs of Renovating and Maintaining the Council's Indoor Leisure Centres Under Different Management and Funding Scenarios (1999)

Note: Some of the details in the above report are commercially sensitive, therefore publication is restricted. However, for Councillors reference copies have been provided in the Members' Rooms at the Town Hall and Civic Centre and individual copies can also be obtained from the Allan Aubrey.)

Aims and Policies for Sport and Leisure Facilities

1. Aims

- 1.1 Council will encourage the inclusion of Sport and Leisure facilities in all new regeneration projects, particularly where a large residential area is planned within the development.
- 1.2 The Council will encourage and assist local leisure and sport providers to increase the level of community participation at their facilities and particularly to assist in targeting under-represented groups with the aim of positive 'inclusion'. This could include providing information to the private operators' i.e. population statistics, providing activity sessions within the Centres via our Sports Development Unit, or perhaps entering into a 'partnership' with local leisure and sport providers to overcome some of the costs to assist in targeting under-represented groups.
- 1.3 Council will act as the facilitator of Public Leisure Facilities, which will include the provision of a new Centre to replace the ageing Leisure stock in Borough, i.e. Dagenham Swimming Pool and Wood Lane Sports Centre. Such a Centre should include facilities that both replace and assist in meeting the Borough's demand as laid out in the Needs Assessment Report (Appendix B). A new Centre should include the following facilities. However, it should be stressed that this is neither a definitive or exhaustive list.

Swimming Pool (25m x 6 or 8 Lane) with Teaching Pool
Sports Hall (4 Courts)
Fitness Suite
Dance Studio
Squash Courts
Floodlight Synthetic 5-a-Side Football Pitches
Children's Adventure Play Area
Licensed Bar and Cafeteria

2 Policy

- 2.1 All Council operated Education Dual Use Leisure Facilities must actively promote and positively encourage Community Use of their facilities. This should be reflected and clearly demonstrated within:-

- Relevant Business Plans for the facility and its operations
- Pricing Structures
- Programmes of Use
- Grant Applications

LEISURE NEEDS ASSESSMENT

**A
REPORT
BY
PMP**

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Appendices

(Note: Copies of the appendices mentioned in this report are available from Elaine Bevis if they are required)

Appendix A	Sport and Leisure Potential Profile
Appendix B	Facility Audit
Appendix C	Demand Models

5 AUGUST 2003

Introduction

- 1.1 In July 2003, PMP was commissioned by the London Borough of Barking and Dagenham (the Council) to produce a leisure needs assessment for the borough as the first stage of an analysis of the future of its leisure services.
- 1.2 This leisure needs assessment covers the following sports facilities:
- swimming pools
 - health and fitness gyms
 - sports halls
 - squash courts
 - synthetic turf pitches.
- 1.3 The purpose of this report is to:
- review the local and national strategic context
 - analyse current trends in the key sports
 - analyse the demographics of the borough
 - undertake an audit of all facilities outlined in 1.2 above. This audit covers both those facilities in the borough and those in neighbouring authorities that impact on the borough
 - map out and assess the demand for the sports facilities in the borough using PMP's in house *Mapping the Future*TM software
 - bring together all of this information and set out the leisure needs of the borough.

Strategic context

Introduction

- 2.1 This section reviews both the local and national strategic context for the sports facilities outlined above. This is an important exercise because it outlines the current aims and objectives relevant to these sport facilities at both a local and governing body and governmental level.

The Barking and Dagenham context

- 2.2 The London Borough of Barking and Dagenham is an outer London borough, bordered by the boroughs of Newham to the west, Havering to the east and Redbridge to the North West and the River Thames to the south. The resident population in 2001 was 163,944. This represents the second smallest population of all the outer London Boroughs. Only Kingston-upon-Thames (147,273) has a smaller population.

A Feasibility Study on Development Options for Dagenham Pool (McAlpine, Thorpe and Warrier Limited, November 1999)

- 2.3 In 1999, Barking and Dagenham Council commissioned a feasibility study to assess the options for the upgrading or redevelopment of Dagenham Pool and the rationalisation of Dagenham's public indoor wet and dry sports facilities.
- 2.4 The possible sites for development were:
- Dagenham Pool
 - Wood Lane Sports Centre
 - Robert Clack School.
- 2.5 Both Dagenham Pool and Wood Lane Sports Centre were considered to be ageing facilities that would require significant investment in the following two or three years to prevent their closure. Robert Clack School was the only secondary school in the borough without a sports hall, and urgently needed one to serve its large and expanding pupil roll, so was seen as another potential site.
- 2.6 Barking and Dagenham was ranked as the fifteenth most deprived local authority area out of 354 in England and Wales, and the worst of the outer London Boroughs. Net cost per swim or leisure visit, however, was one of the lowest in London and the Borough had a younger age profile than that of the UK as a whole.
- 2.7 A number of development options were proposed, including:
- a "do nothing" option
 - the refurbishment of the both facilities
 - the construction of a new wet and dry facility at either the Dagenham Pool or the Wood Lane Sports Centre site, with the other site being sold.
- 2.8 All of the proposed options also included the construction of a sports hall at the Robert Clack School site.

SECTION 2 – STRATEGIC CONTEXT

- 2.9 The “do nothing” option was not cost free as the Council faced remedial expense at both sites. Additionally, this would have had no appreciable impact on the level of either customer demand or satisfaction and was therefore not considered the best option.
- 2.10 A survey of 300 Dagenham residents demonstrated that:
- 43% of all residents, and 70% of 16 to 19 year olds, used leisure centres
 - the average frequency of use was 0.9 visits per week
 - 61% of residents felt it was necessary to upgrade Dagenham Pool, with 16 to 19 year olds the keenest to see improvements.
 - the new facilities most desired by residents included indoor children’s play (44%), a leisure pool (42%) and an improved health suite and gym.
- 2.11 The two most popular development options among residents were the upgrade of the existing Dagenham Pool or the development of a new wet and dry facility at the Dagenham Pool site, with the Wood Lane site being sold. The development of a new wet and dry facility at the Dagenham Pool site was also the most popular option among schools. Combining the wet and dry facilities on one site, either at Dagenham Pool or at Wood Lane, would also reduce the duplication of management costs, have the lowest on-going revenue subsidy and be more attractive to a PFI bidder than the other options.
- 2.12 The Amateur Swimming Association (ASA) has supported the plan to upgrade facilities at Dagenham Pool. The British Mountaineering Council felt there was a strong case for an indoor climbing wall, as there is no provision in the area and this is a fast growing and financially viable sport.
- 2.13 The catchment population within a 15 minute drive time of this part of Dagenham was 435,800. The Sportplan Facilities Planning Model based on Sport England’s demand and supply parameters suggested that current swimming usage of the Dagenham Pool was well below the predicted demand level. Wood Lane Sports Hall also attracted significantly below the predicted number of visitors.

National context

Introduction

2.14 The government has outlined a number of cross-cutting themes and agendas that the development of improved leisure facilities in Barking and Dagenham could help to address. These include:

- **young people** – by providing services and activities designed to appeal particularly to the 16 to 24 age group who are particularly at risk of exclusion
- **social inclusion** – by providing activities for people on low income, members of ethnic minorities and others at risk of exclusion
- **community safety** – by providing diversionary activities for those at risk of becoming involved in criminal or anti-social behaviour and providing a welcoming community space for members of the community to meet in safety
- **lifelong learning** – with the provision of informal learning spaces as well as a formal programme of lifelong learning opportunities.

Game Plan: A Strategy for delivering Government's sport and physical activity objectives (2003)

2.15 This strategy was commissioned by the Government to look in detail at how it could play its part more effectively in increasing participation and high performance in sport.

2.16 Recommendations are made in the following four areas:

- **grassroots participation:** a wide range of initiatives are needed, with a focus on economically disadvantaged groups, in particular young people, women and older people. These need to tackle all the barriers to participation (such as lack of time, cost, information or motivation) as well as failures in provision (poor coaches or facilities)
- **high performance sport:** there needs to be a better prioritisation of which sports are funded at the highest level; better development of talented sportsmen and women to help them reach that level; with funding streams and service delivery more focused on customer needs
- **mega sporting events:** there should be a more cautious approach to hosting these events. A set process for government involvement, including a clear assessment of the benefits is needed
- **delivery:** organisational reform and determining exactly what works are needed before the Government considers further increases to its investment in sport. Less money should go to bureaucrats and more to the end user. Public, private and voluntary sectors need to work together better towards a common goal.

2.17 The Government's overall objective is to increase the participation levels of all people and particularly focuses on developing participation amongst the most economically disadvantaged groups in society (ie, lower socio-economic groups, young people, women, older people).

National Strategic Swimming Documents

- 2.18 **Amateur Swimming Association's (ASA) National Facilities Plan (2002)** encourages sensible investment in the development of a strategic network of accessible, cost efficient, well designed and managed pools to cater for demand across swimming's various disciplines.
- 2.19 Within the facility plan, the ASA has set out a strategic network of facilities to help guide local authorities' decisions over investment into existing and new facilities. However, there are no existing pools in the borough that are listed in the plan as strategically significant along these criteria. The nearest 25 metre, 8 lane pools are at Barnet and Edmonton. However, the ASA has also outlined its desire for a 25 metre, 6 lane competition pool in every local authority and was supportive of the proposed redevelopment of Dagenham Pool.
- 2.20 The ASA recognises that the high costs of building, operating and maintaining pools, together with the major ongoing investment needs of existing facilities, means difficult decisions need to be taken as to where resources should be invested.
- 2.21 In November 2001, an evidence session, followed by a report from the House of Commons Select Committee **Testing the Waters; The Sport of Swimming** (January 2002), announced the following issues for consideration:
- historic swimming pools
 - the availability of swimming facilities in communities
 - the availability of facilities and training support for competitive swimmers.
- 2.22 The Select Committee received evidence allowing them to conclude that in England, 'pools are struggling to meet the needs of their wide variety of users and in particular there is a manifest paucity of 50 metre competition class pools'. An objective is to have at least one eight lane, 25 metre pool with adequate spectator support in each county, and to increase the number of 50 metre pools in line with provision in other comparable countries.
- 2.23 The Institute of Sport and Recreation Management (ISRM) and the ASA agree that any new pools that are built, including 50 metre competition pools, must have flexible designs to enable maximum use by the whole community. They advocate the use of moveable floors, booms and bulkheads to enable pools to be altered in size and shape as different users swim throughout the day. The Committee endorsed this view and see a case for investing in 50 metre pools, which will have these characteristics.
- 2.24 Both the ASA's strategy and the House of Commons Select Committee paper demonstrate the governing body and national government support for improving England's existing stock of swimming pools.

2012 Summer Olympics

- 2.25 In spring 2003, it was confirmed by Government that London would be bidding to host the Summer Olympics in 2012. The initial feasibility study carried out by Arup focused on the main competition venues for the Games being built in the Lower Lea Valley in East London, which is close to, although not in, the borough.

SECTION 2 – STRATEGIC CONTEXT

- 2.26 Although none of the sites for the main facilities (eg the stadium, 50 metre pool) identified at this stage is in the borough, the proximity of the borough to the Lower Lea Valley means that it has a potential role to play in terms of the numerous support facilities that will be needed for athlete training and preparation prior to the Games.
- 2.27 Key criteria for all facilities developed include ensuring that they provide a lasting and sustainable legacy for London and that they provide a catalyst for regeneration. The Government wants to ensure that there would be no 'white elephants' after the Games.
- 2.28 Thus, there is the potential for ensuring that any facilities developed in the borough in the future could play a role as a support facility for the 2012 Olympics.

Conclusion

- 2.29 The need for the refurbishment or redevelopment of the Council's key leisure facilities has already been identified in previous work.
- 2.30 The current strategic climate requires facilities that encourage participation from grassroots level up to elite performance level and that will encourage participation by all ages and sections of society. Furthermore, there are a number of opportunities, such as the 2012 Olympics and the ASA's National Facilities Strategy, which provide opportunities and a context for the future of leisure services in the borough.

Current trends in the main sports

Introduction

- 3.1 In this section, the current trends in health and fitness activities and in public sector leisure centre activities are analysed. This will allow some interpretation of future demand for these activities.

Current trends in health and fitness activities

- 3.2 Health and fitness continues to be an expanding market. We have drawn upon a number of surveys and reports in order to assess future market trends. The key findings are set out below.

Game Plan (Department of Culture, Media and Sport, 2002)

- 3.3 *Game Plan* is the national strategy for delivering the Government's sports and physical activity objectives. It recognises the growth in private health and fitness clubs over recent years: in 2001, there were 1792 private health clubs in the UK with 720 more in the planning stages, compared with a minimal number in 1980. Membership of private clubs has increased by 21% between 2000 and 2001.

Mintel (1999) Health and fitness Report

- 3.4 Mintel's 1999 report on health and fitness clubs states that the percentage of the population who are members of clubs has been increasing since 1994, and is likely to continue to rise. Attrition rates are also falling. In 1999, 14% of adults claimed to use some kind of health and fitness facility, with a further 21% suggesting that they want to in the future.
- 3.5 In 1999, 21% of British women and 17% of British men were classified as obese and these levels have risen over recent years. With around one in six adults thinking they should do a lot more about their health, and one third saying they should exercise more than they do, the predicted increase in obesity is likely to stimulate the health and fitness industry further.
- 3.6 The majority of health and fitness users come from the AB social group, and are between the ages of 20 and 44. 75% of users visit fitness facilities at least once per week, with over 65% of users visit three times per week.

Leisure Database Company *State of the Industry Report 2003* (from Leisure Report, January 2003)

- 3.7 The Leisure Database Company's fourth annual audit, *State of the Industry Report 2003*, sets out some of the latest research and thinking about the health and fitness sector. The report states that the industry has seen steady growth in 2002. The total membership of public and private health clubs has grown to 5.84 million, an increase of 9.5% on last year's figure of 5.33 million. Penetration rates in the UK, ie the percentage of people who use clubs, have also increased from 8.9% in 2001 to 9.9% in 2002. However, the UK still trails behind the 13.5% penetration rate in the United States as quoted by the International Health and Racquet & Sports Club Association in its *Profiles of Success* report.
- 3.8 Overall, the industry remains confident, with planning applications increasing by 60% between 2001 and 2002.

- 3.9 It has been predicted that the UK fitness club market is on the verge of saturation. However, many operators dispute this. Indeed, the Leisure Database Company's forecasts indicate at least four more years of continued growth.

Conclusion

- 3.10 PMP's view is that the health and fitness market is still growing. Saturation within the next three to four years is unlikely. Furthermore, as the proportion of traditional 25 to 44 year old gym users declines in line with UK demographic changes, there will be an increasing need to target the growth market of the over 55s. This represents a new market and potential for further growth.

Public sector leisure centre activities

Admissions

- 3.11 During the period 1997 to 2001, there was an 11.5% increase in the number of leisure centres and swimming pools across the UK. Admissions have also increased by 3%. This growth has been achieved in the context of a marketplace that has become more complex due to increased competition from the private health and fitness market.

Popular facilities

- 3.12 Swimming pools and sports halls continue to be the most popular facilities used by consumers visiting leisure centres, although there is evidence that their popularity is waning. The other most popular facility used in leisure centres is the fitness room, reflecting the fact that they have benefited from the fitness boom of the past decade, as well as the fact that leisure centres offer a pay and play option that the membership-based private clubs do not.

Visits

- 3.13 Approximately one in five consumers or their families visit a leisure centre once a week or more, with just over one in ten visiting fortnightly or monthly and nearly a quarter visiting less often than this. The remaining two fifths never visit a leisure centre. This is particularly the case amongst older people, who are markedly less likely than average to visit leisure centres.

Admissions costs

- 3.14 Aside from the provision/availability of facilities, probably the next biggest influence on the likelihood of consumers to visit a leisure centre or swimming pool is the cost. In the past five years the cost has increased much faster than the retail price index, meaning that relative to other goods and services it has become much more expensive. This has contributed, as well as increased spending on ancillary items, to an increase in overall consumer expenditure on leisure centres and swimming pools of 24% between 1997 and 2001.

Level of provision

- 3.15 Increase in the provision of leisure centres and swimming pools has reduced the average population in the leisure centres' catchment areas, thus helping to reduce overcrowding. However, traditionally leisure provision has been fairly low down the list of many local authorities' priorities. The results being that leisure centres built in the 1960s and 70s have suffered from a chronic lack of investment.

Private sector involvement

- 3.16 Although the number of private sector management contractors running public leisure centres and swimming pools has increased in the last five years, as a proportion of total sites, their involvement is still quite small, with most of the centres and pools being run by the in-house DSO. The switching of DSO operations into not-for-profit trusts and companies limited by guarantee has the potential to offer local authorities cost-reduction benefits.
- 3.17 This switch to not-for-profit trusts and companies limited by guarantee also has some disadvantages:
- it can result in a loss of control for local authorities
 - the lack of track record of any newly formed trust can make it difficult to secure financial support
 - the financial benefits depends on various issues such as property ownership and programming and as a result the savings for the council can occasionally be marginal.

Conclusion

- 3.18 The health and fitness industry has still not reached saturation and growth is predicted for the foreseeable future. This is important because health and fitness facilities form a key component of many leisure facility developments. There are also age groups, such as the over 55s, which have lower participation rates and present further opportunities for growth.
- 3.19 Public sector leisure facilities, such as sports halls and swimming pools, continue to be popular, although there are signs that this popularity is waning. However, the older age groups again have lower participation rates and so there is potential growth there. Many public sector facilities, which were built in the 1970s, are currently ageing, such as Dagenham Pool and Wood Lane Sports Centre, and the refurbishment or redevelopment of these facilities should be a priority.

Demographic analysis

4.1 The following section presents an analysis of the demographics of the local authority area according to the 2001 Census. This provides a summary of the local market, which is an important consideration in the future of leisure provision in the borough.

Population characteristics

Table 4.1 Population characteristics of Barking and Dagenham

	Borough	Significance
Population	<ul style="list-style-type: none"> total population of 163,944. 48% of the population is male and 52% female there is a higher than average proportion of people aged under 16, 16 to 19 and 20 to 29 and, thus, a lower than average proportion over 30 	<ul style="list-style-type: none"> Barking and Dagenham, although lower in population compared to other outer London boroughs, has a high population density and a large potential market there is a young population and this section of the population tends to have higher levels of participation in sport
Ethnic origin	<ul style="list-style-type: none"> 85.2% of the population is white compared to a national average of 90.9 % there is an above average proportion of ethnic minorities, especially Pakistani, Caribbean and African 	<ul style="list-style-type: none"> the specific needs of the ethnic minorities must be taken into account in the provision of leisure facilities to facilitate participation from these groups
Economic activity	<ul style="list-style-type: none"> the percentage of unemployed people is higher than average at 4.5% compared to the national figure of 3.4% 	<ul style="list-style-type: none"> there is a higher level of unemployment, indicating the need for affordable sports and leisure facilities
Mobility	<ul style="list-style-type: none"> the population's mobility levels are lower than average with 37.9% of the population (compared to 26.8% nationally) not having a car and 17.1% (compared to 29.4% nationally) having two or more cars 	<ul style="list-style-type: none"> mobility is below average, which emphasises the need to ensure that the facilities are well served by local public transport.

Sport and leisure potential profile for Barking and Dagenham

- 4.2 A sport and leisure potential profile for an area is calculated using data from Continental Research's Million Plus Panel. The profile is calculated using the entire Barking and Dagenham borough area and analysing the propensity of residents to take part in some of the main sports and leisure activities. A full breakdown can be found in Appendix A.
- 4.3 In terms of sports covered in this report, only in football did the borough's residents demonstrate a higher than average propensity to take part. Other sports in the area that had a higher than average propensity were motorcycling and angling.
- 4.4 The residents had a lower than average propensity to take part in swimming, squash and health and fitness.
- 4.5 It is also important to note that the percentage of the population that did not take part in any sport was above average (38.7% for the borough compared to 35.4% nationally).
- 4.6 These are, again, important considerations for leisure services because it shows the sports in which the residents are less inclined to take part. However, the reasons for this may be the condition or provision of facilities in the borough and so it could indicate that there may be additional demand if better facilities were available.

Facility audit and demand modelling

Facility audit for Barking and Dagenham

- 5.1 A facility audit has been completed as the first stage in the demand modelling for the following facilities in the borough:
- swimming pools
 - sports halls
 - health and fitness gyms
 - squash courts
 - synthetic turf pitches.
- 5.2 This audit not only covers the entire borough, but also all facilities within a 3 mile (5 kilometre) radius (called the *Buffer Zone*). It is important to include these facilities as they will impact upon the population in the borough (ie some of the residents in the borough will live within their catchment areas).
- 5.3 The full results of the facility audit can be found in Appendix B.

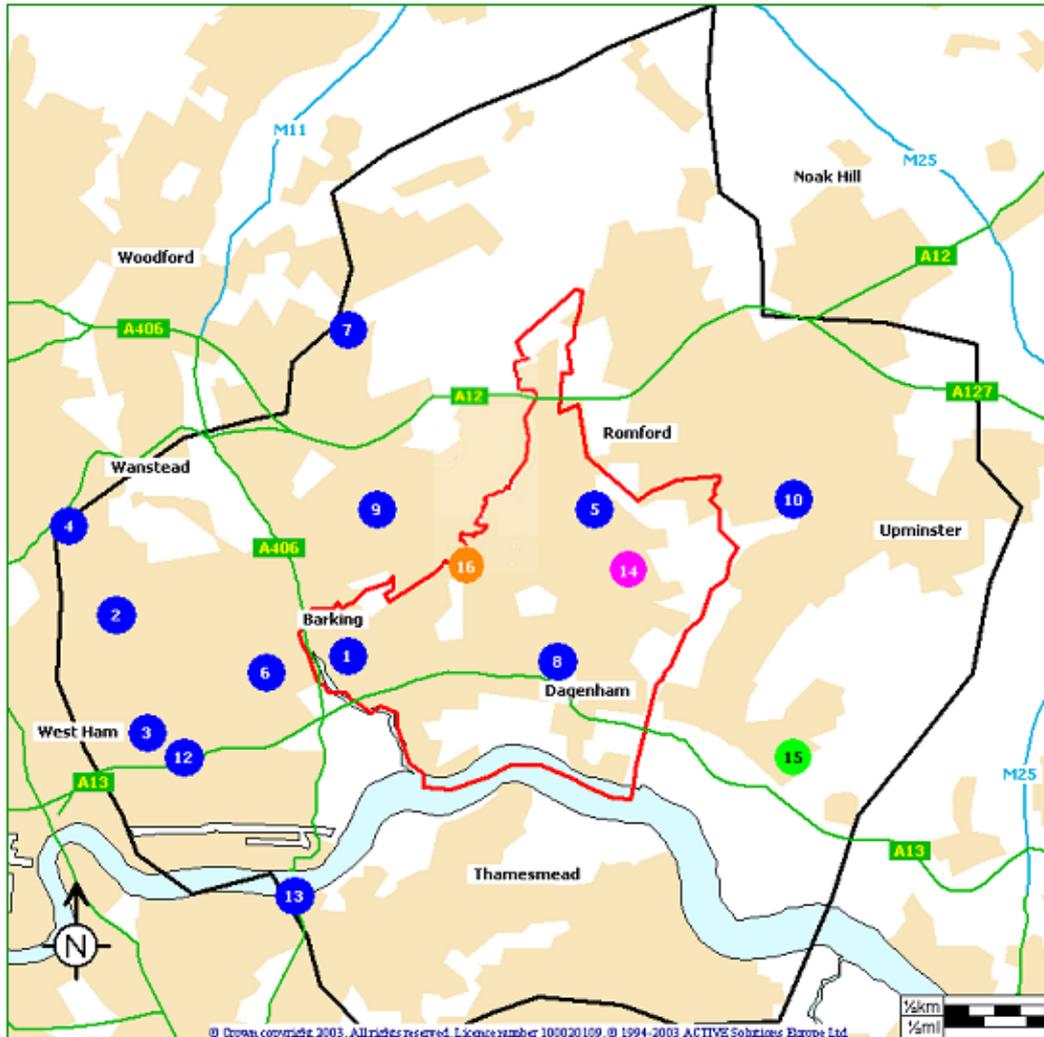
Demand Modelling

- 5.4 *Mapping the Future*[™] (*MtF*) modelling techniques and demand parameters have been applied to the findings of the facility audit in order to gain an indication of the level of any current surplus or undersupply of facilities and the need for, or impact of, any new facility developments. The full set of parameters and assumptions relating to the models are set out in detail in Appendix C.
- 5.5 For each of the facilities, two different scenarios were modelled.
- the first was for the borough alone, excluding any facilities in the buffer zone.
 - the second included the facilities in the buffer zone because the population does not stay exclusively in its own borough when taking part in leisure activities.

Facility audit and demand modelling results

Swimming pools

Figure 5.1 Map showing swimming pools in and around Barking and Dagenham



Key:

-  5km Buffer
-  Barking & Dagenham Borough Boundary
-  Public Facilities
-  Private Facilities
-  Dual-use Facilities
-  University Facilities

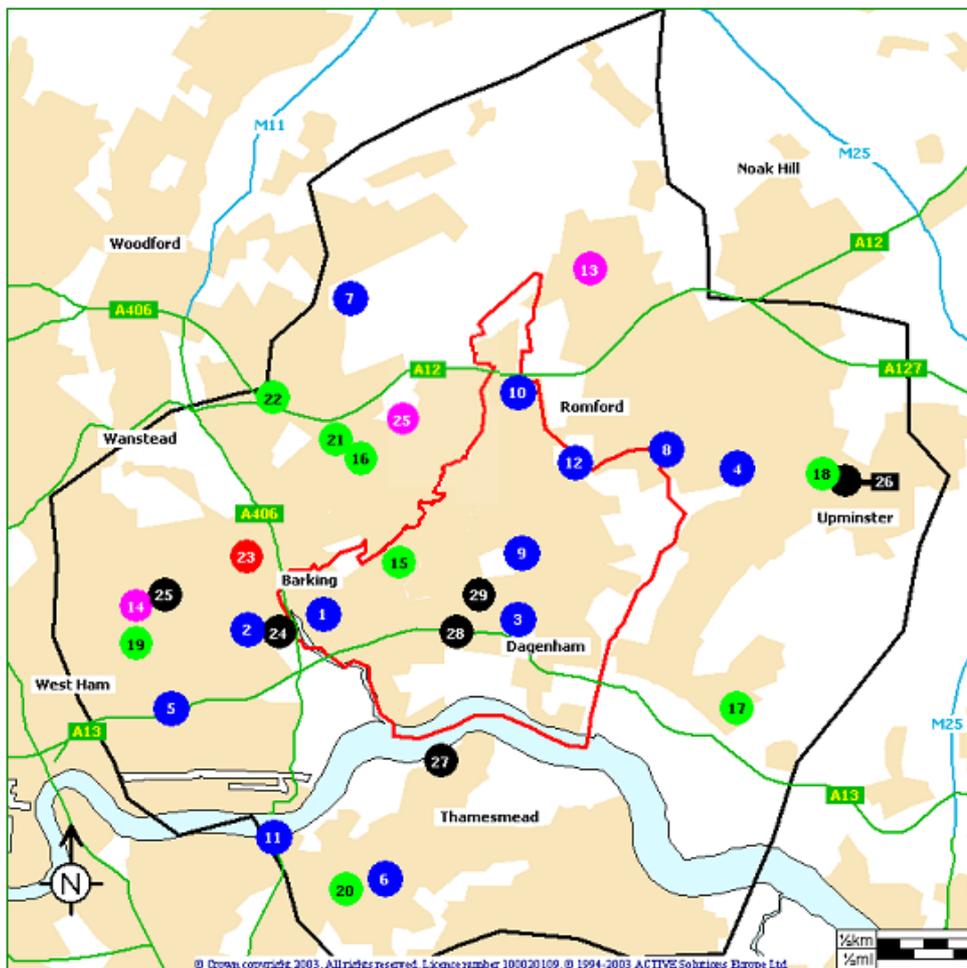
ID	Name
1	Abbey Sports Centre
2	Atherton Leisure Centre
3	Balaam Leisure Centre
4	Cathall Leisure Centre
5	Dagenham Swimming Pool
6	East Ham Leisure Centre
7	Fulwell Cross Swimming Pool & Rec Centre
8	Goresbrook Leisure Centre
9	High Road Swimming Baths
10	Hornchurch Sports Centre
11	Hornchurch Sports Centre
12	Newham Leisure Centre
13	Waterfront Leisure Centre
14	Golds Gym
15	Chafford School
16	University East London

SECTION 5 – FACILITY AUDIT AND DEMAND MODELLING

- 5.6 Five swimming pools were identified in the borough and a further 12 in the buffer zone. Of the five pools in the borough:
- three were public facilities
 - one was a university facility
 - one was private.
- 5.7 Of the 12 in the buffer zone, ten were public facilities.
- 5.8 The demand assessment shows a current oversupply of swimming pools within the borough of 558 m². It is predicted that this will rise to 589 m² in 2005.
- 5.9 The demand assessment for the borough and the buffer zone also shows an oversupply of swimming pools of 1,280 m² now and 1,232 m² in 2005.

Sports halls

Figure 5.2 Map showing sports halls in and around Barking and Dagenham



Key:

-  5km Buffer
-  Barking & Dagenham Borough Boundary
-  Public Facilities
-  Private Facilities
-  Dual-use Facilities
-  Club-use Facilities
-  Planned Facilities

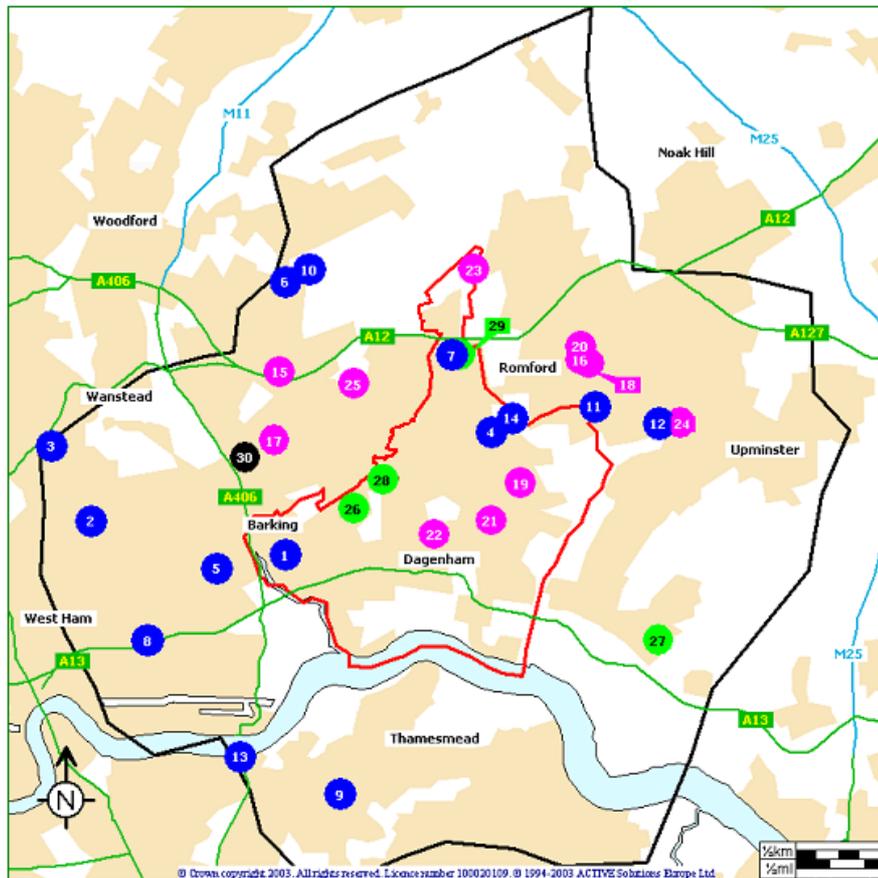
ID	Name
1	Abbey Sports Centre
2	East Ham Leisure Centre
3	Goresbrook Leisure Centre
4	Hornchurch Sports Centre
5	Newham Leisure Centre
6	Plumstead Sports Centre
7	Redbridge Sport and Leisure
8	Romford YMCA
9	Sydney Russell Leisure Centre
10	Warren Sports centre
11	Waterfront Leisure Centre
12	Wood Lane Sports centre
13	North Romford Community Association
14	St Bonaventures School
15	Barking Abbey School Leisure Centre
16	Canon Palmer Catholic School
17	Chafford School
18	Havering Sixth Form College
19	Lister Community School
20	Plumstead Manor School
21	Seven Kings High School
22	Valentines High School
23	Little Ilford Youth Centre
24	School Sports Centre
25	Sports Hall
26	Sports Hall
27	School Sports/Arts Building
28	School/Community Leisure Building
29	School/Leisure/Community Development

SECTION 5 – FACILITY AUDIT AND DEMAND MODELLING

- 5.10 Seven sports halls were identified in the borough. A further 16 were identified in the buffer zone. Of the borough's sports halls:
- six are public
 - one is dual use.
- 5.11 Six of the 16 in the buffer zone were public.
- 5.12 The demand assessment shows an adequate supply of sports halls in the borough at present, although taking into account the planned facilities, there could be an oversupply of eight courts in 2005. However, the model predicts that the most likely scenario is an adequate supply of sport halls in 2005 as well.
- 5.13 In the buffer zone, the model predicts an unmet demand now (114 courts) and an unmet demand in the future (between 88 and 100 courts).

Health and fitness facilities

Figure 5.3 Map showing health and fitness facilities in and around Barking and Dagenham



Key:

-  5km Buffer
-  Barking & Dagenham Borough Boundary
-  Public Facilities
-  Private Facilities
-  Dual-use Facilities

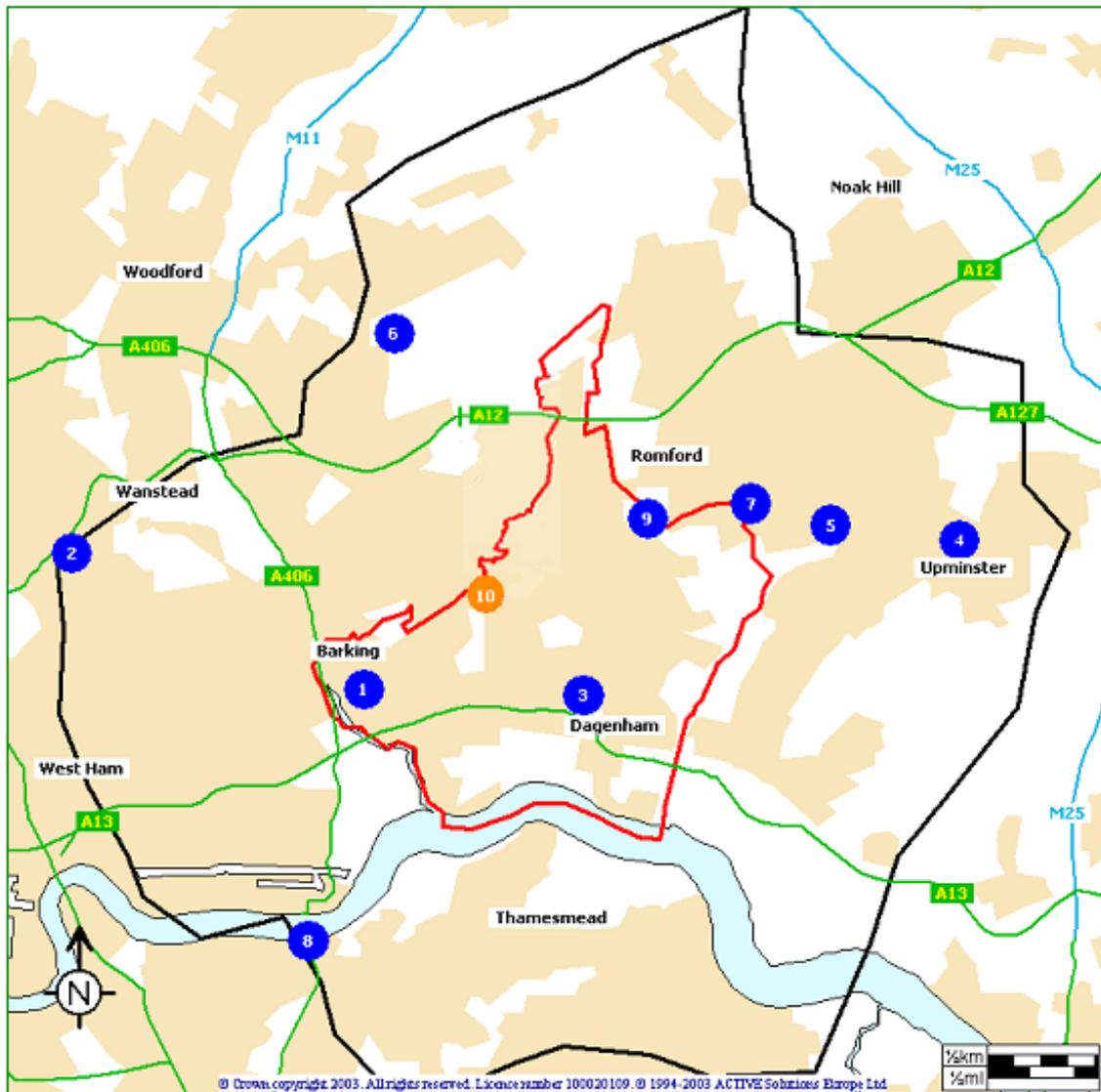
ID	Name
1	Abbey Sports Centre
2	Atherton Leisure Centre
3	Cathall Leisure Centre
4	Dagenham Swimming Pool
5	East Ham Leisure Centre
6	Fulwell Cross Swimming Pool and Recreation Centre
7	Goresbrook Leisure Centre
8	Newham Leisure Centre
9	Plumstead Sports Centre
10	Redbridge Sport and Leisure
11	Romford YMCA
12	Quantum (in Hornchurch Sports Centre)
13	Waterfront Leisure Centre
14	Wood Lane Sports centre
15	Apples Health and Fitness Centre
16	Esporta Health Club
17	Fitness First Ilford
18	Fitness First Romford
19	Golds Gym
20	Lady of America Fitness and Weight Loss Centre / KAV03
21	Peak Fitness Studio
22	The Body Factory (TBF)
23	The Gym / City Limits
24	The Origin
25	Warren's Gym
26	Barking Abbey School Leisure Centre
27	Chafford School
28	University East London
29	Warren Sports Centre
30	183 Flats/Supermarket

SECTION 5 – FACILITY AUDIT AND DEMAND MODELLING

- 5.14 Twelve health and fitness facilities were identified in the borough and a further 17 in the buffer zone. Of those in the borough:
- five are public
 - three are dual-use
 - four are private.
- 5.15 Of the 17 in the buffer zone, eight are public.
- 5.16 The demand assessment shows an unmet demand of health and fitness facilities in the borough of 69 stations (ie pieces of equipment). Taking into account population projections and planned facilities, it is predicted that this will fall to an unmet demand of 65 stations in 2005.
- 5.17 The demand assessment also shows a large undersupply of health and fitness facilities in the area including the buffer zone.

Squash courts

Map showing squash courts in and around Barking and Dagenham



Key:

-  5km Buffer
-  Barking & Dagenham Borough Boundary
-  Public Facilities
-  University Facilities

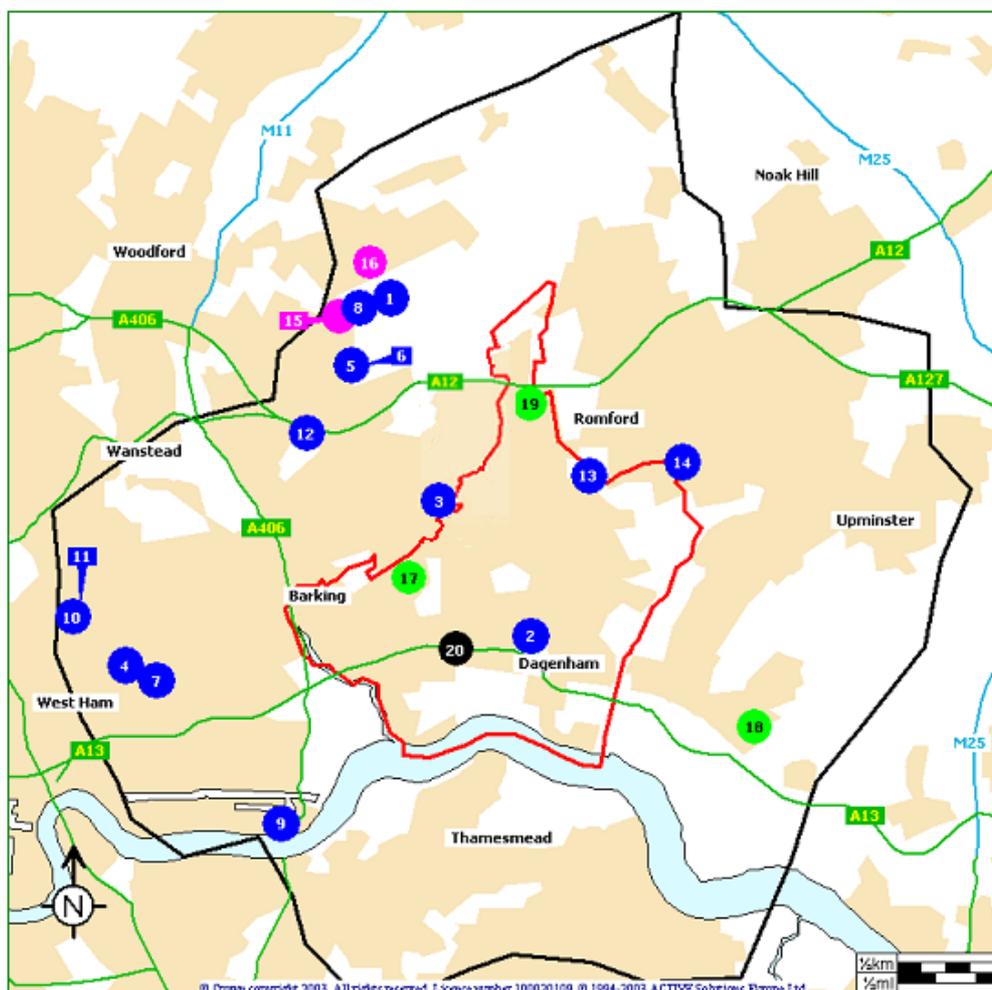
ID	Name
1	Abbey Sports Centre
2	Cathall Leisure Centre
3	Goresbrook Leisure Centre
4	Havering Sports Centre
5	Hornchurch Sports Centre
6	Redbridge Sport and Leisure
7	Romford YMCA
8	Waterfront Leisure Centre
9	Wood Lane Sports Centre
10	University - East London

SECTION 5 – FACILITY AUDIT AND DEMAND MODELLING

- 5.18 Five squash court facilities were identified in the borough and a further five were identified in the buffer zone. Of the facilities in the borough:
- four are public
 - one is a university facility.
- 5.19 All of the five in the buffer zone are public facilities.
- 5.20 The demand assessment shows an unmet demand for squash facilities in the borough of three courts. This unmet demand is predicted to be at the same level in 2005.
- 5.21 The demand assessment for the borough and the buffer zone shows a bigger unmet demand of courts of 61.

Synthetic turf pitches

Figure 5.4 Map showing STPs in and around Barking and Dagenham



Key:

- 5km Buffer
- Barking & Dagenham Borough Boundary
- Public Facilities
- Private Facilities
- Dual-use Facilities
-

ID	Name
1	Fairlop Oak Playing Field
2	Goals Dagenham
3	Goodmayes Park
4	Lister Gardens
5	Oakside Stadium
6	Oakside Stadium
7	Plaistow Park
8	Redbridge Sports Centre
9	Royal Victoria Gardens
10	Stratford Park
11	Stratford Park
12	Valentine Park
13	Wood Lane Sports Centre
14	YMCA Romford
15	Elmbridge Sports & Social Club
16	Lloyds Sports Ground
17	Barking Abbey School
18	The Chafford School and Sports Centre
19	Warren Comprehensive School
20	School/Community Leisure Building

- 5.22 Five STP facilities were identified in the borough and a further 14 in the buffer zone. Of those in the borough:
- three are public
 - two are dual-use
 - one is full-size, the rest being five-a-side pitches.
- 5.23 Of the 14 in the buffer zone, 11 are public and 10 are full-size.
- 5.24 The demand assessment for the borough shows a current unmet demand of full-size STPs of 1.5 pitches. This unmet demand is predicted to remain at the same level in 2005.
- 5.25 For the borough and the buffer zone, there is a current unmet demand of 2.7 pitches and, again, the demand is predicted to remain at this level in 2005.

Conclusion

- 5.26 It is important to stress at this point that the demand modelling exercise is one of the sources of evidence for assessing the leisure needs of any area. For example, it does not assess the quality of the facilities on offer, nor the views of local sports clubs and governing bodies.
- 5.27 Therefore, its results must be considered in relation to the strategic context and current trends in the relevant sports.
- 5.28 Having said this, this exercise has demonstrated the following:
- the supply of swimming pools in the borough is more than satisfactory
 - the supply of sports halls in the borough is adequate
 - there is an undersupply of health and fitness facilities, squash courts and full-size STPs in the borough.
- 5.29 Both health and fitness facilities and STPs provide significant income streams in new leisure developments.

Conclusion

6.1 This report has drawn together information from a variety of sources (strategic documents, demographic analysis, demand modelling, etc) in order to assess the leisure needs of the London Borough of Barking and Dagenham. As stressed in the last section, it is important not to consider any one piece of evidence in isolation, but to bring all relevant pieces together in making the final assessment. Thus, the needs for each sports facility covered are outlined below.

Swimming pools

6.2 The need to replace the borough's existing pools has been identified in previous work. It is acknowledged that Dagenham Pool is in a poor state of repair and 61% of residents felt it was necessary to upgrade it.

6.3 The Council is looking to improve the quality of its indoor wet facilities and the two most popular options amongst residents were the upgrading of Dagenham Pool or the redevelopment of the Dagenham Pool into a dual wet and dry facility.

6.4 In addition to this, swimming pools are still one of the most popular facilities at leisure centres. The ASA has also indicated that it would like to see at least one competition pool (25 metre) in each local authority and there is the potential for the borough to provide support facilities for the Olympics.

6.5 Although the demand modelling indicates that there is a more than satisfactory level of swimming pool provision in the borough, it does not take into account the quality of the facilities.

6.6 Therefore, the priority for the borough should be the improving of the quality of existing facilities through refurbishment or rebuilding, rather than the provision of additional pools.

Sports halls

6.7 Along with swimming pools, sports halls are the most popular facility in local authority leisure centres. The demand modelling for sports halls shows that the current supply is adequate (although only just so).

6.8 However, quality has, once again, been identified as an issue and the Council is already looking to rationalise and improve the quality of its public dry indoor facilities.

6.9 Therefore, the priority for sports halls in the borough, as with swimming pools, should be on improving the quality of the existing provision. However, as the supply was only just adequate and there was an unmet demand in the buffer zone, there is limited potential for providing additional facilities.

Health and fitness facilities

- 6.10 From the assessment, it would appear that there is an unmet demand for health and fitness facilities in the borough. The demand modelling indicates that there is an undersupply at present and predicts that this will remain in the future.
- 6.11 The Council is also looking to improve the quality of its indoor dry facilities and health and fitness facilities form and important part of them. Unsurprisingly, many of the health and fitness facilities in the borough are private. As the borough has a higher than average level of deprivation, many of these facilities may remain inaccessible to a large proportion of the population, although this is dependent on pricing.
- 6.12 Finally, it is predicted that the health and fitness market has not yet reached saturation and will continue to grow. There are also sectors of the population, eg the over 55s, whose participation levels are still low and so it would appear that there is still unmet demand.

Squash courts

- 6.13 The demand modelling indicates that there is a small undersupply of squash courts in the borough and a large unmet demand in the wider area. However, this must be considered alongside the fact that squash is a sport that has been declining in popularity in recent years and the sport and leisure potential profile for the area showed a below average propensity of the borough's population to play squash.
- 6.14 Although ultimately dependent on the views of the users, it appears that the provision of additional new courts in the borough is not a priority. However, it is important that the quality of existing provision is maintained.

Synthetic turf pitches

- 6.15 The demand modelling indicated that there is a small undersupply of full-size STPs in the borough. However, the supply of five-a-side areas is better (four sites in total). Football is one of the sports for which the borough has a higher than average propensity to take part (22.2% compared to 19.7% nationally). As football is one of the main users of STPs, it would appear that there is a need for additional pitches bearing in mind the standard set down by Sports England is one STP for every 60,000 within a 20-minute off-peak drivetime.
- 6.16 The preceding summary outlines the leisure needs for the London Borough of Barking and Dagenham. One final point that is worth highlighting is that the borough currently has a lower than average propensity to take part in a large range of sports (see Appendix A). Increasing the quality of existing provision may therefore stimulate some of this latent demand and increase participation levels in the borough.