Greater Norwich Needs Assessment:

Needs Assessment 4: Indoor Bowls, Indoor Tennis Centres, Health & Fitness, Village Halls and Community Centres

Final Report

Greater Norwich Area

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Introduction

1. This report sets out the supply and demand assessment report for five facility types across the Greater Norwich area in 2013 and up to 2026. It is based on utilising Sport England strategic planning tools and building in the findings from National Governing Bodies of sport and from local consultation across each of the facility type.

2. The sequence of contents for this report are:

- to describe the planning tools and techniques applied in the assessment; and

- to carry out an assessment of the current supply and demand for each facility type in 2013 and future assessment up to 2026. Findings from consultations on the supply and demand assessment and views on the current and future need from part of this assessment.

- To present a summary of the findings for each facility type under the three headings of quantity, quality and accessibility.

- The findings for each facility type are carried forward into the Greater Norwich indoor sports facilities strategy and action plan for each authority.

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

3. 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.

4. Furthermore there is no local hard evidence base of the supply, demand or accessibility to these facility types which has been developed by the Greater Norwich authorities. The methodology applied for each facility type is described next.

5. **Indoor bowls** the supply and demand assessment for indoor bowls is based on the Sport England analysis facility planning model technique which is applied for swimming pools and sports halls. In 2013 Sport England undertook a national assessment of the supply and demand for indoor bowls. Sport England has agreed that the Greater Norwich study can access this and set out the findings for the Greater Norwich authorities. This provides much more detailed and extensive hard evidence data on supply demand and access than would have been possible from other sources.

6. It is also a like for like assessment across the three Greater Norwich authorities. Indoor bowls is an important facility type as the profile of sports participation across the Greater Norwich area has identified with a profile of current participation and aging population which is most likely to see an increase in the number of participants who play indoor bowls.

7. **Indoor tennis centres –** the supply and demand assessment for indoor tennis centres is based on Sport England Active Places Power planning tool.

8. **Village halls,** this is not a facility type listed in the study brief however in both Broadland District and South Norfolk District village and community halls are an important provision for community and recreational activities. They are not a sports specific dedicated facility type which meets standards of provision for any particular sport. They do however provide a venue where some physical activity takes place and the sports hall assessment identifies the areas of Greater Norwich which are outside the catchment area of a sports hall and there is not enough demand in the area to warrant provision of a dedicated sports facility.

9. It is important to apply the sports hall supply and demand assessment to identify where these areas are and to assess whether there are village/community halls in these areas and the extent to which they can meet some of the demand for indoor activities.

10. **Community Centres with sports uses** this facility type is included because it is recognised that in the City of Norwich there is extensive provision of 18 community centres. Whilst the size of the individual centres is around 1 – 2 badminton courts and therefore not of a size for the playing of indoor hall sports, excepting short mat carpet bowls, table tennis and possibly some martial arts, it is recognised the venues do provide for physical activities such as dance and exercise classes. So in assessing the future supply and demand for physical activity as well as for sport it is important to consider the scale of the existing provision and the contribution it can meet to meeting the aims of the strategy.

11. **School indoor sports facilities and built facilities** are included in the study brief. The content is swimming pools and sports halls, including school gymnasiums and the assessment of the supply and demand for school based sports facilities is included in the subsequent section on swimming pools and sports halls. Artificial grass pitches are included in the playing pitch study.

12. Table 1 overleaf sets out which planning tool or technique has been applied to develop the supply and demand assessment for each facility type. For some facility types there is more than one source.

Table 1: Method and which 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 Halls	Indoor Tennis Centres	Village/ Community Halls	Community Centres with Sports Use
Active Places Power						✓		
National Facility Assessment based on the facility planning model	✓	✓	✓		✓			
Sport England Assessing Needs and Opportunities Guide (February 2014)	✓	✓	✓			✓		
Fitness Industry Association				✓				
Greater Norwich Assessment based on local survey and data							✓	✓

13. Set out next is the hard evidence findings for each facility type, starting with indoor bowling.

INDOOR BOWLING CENTRES

14. Indoor bowls are an important sports activity for the Greater Norwich area as shown by the profile of sports participation and the number of sports participants in the age groups which play indoor bowls.

15. The adult sporting profile of participation showed each authority has between 2 – 3% of its total adult sports participation taking place in indoor bowling. Also the sporting profile for each authority showed a growing aging sporting population and so based on the aging of the core resident population indoor bowls sporting population will increase, simply because of an increased population and even if the rate of sports participation does not increase.

16. Furthermore the Greater Norwich area has 9 indoor bowling centres of which eight centres are four rinks or larger, so there is extensive provision of this facility type.

17. The details on the supply of indoor bowling provision are set out in Table 2 overleaf. These shows there are 3 centres in Broadland, 2 in Norwich and 4 in South Norfolk.

18. There are 45 rinks in total and as at 2013 all centres are operational. 5 of the centres operate as a pay and play access whilst 4 operate as club venues. In terms of ownership 8 of the centres are club owned, with 1 owned by Norwich Council.

19. The key finding on supply is the age of the centres: with 6 centres opened in the 1960's; 2 opened in the 1980's; and 1 opened in the 1990's. The youngest centre is the Acle Indoor Bowls Club opened in 1994 and so now some 20 years old.

20. However despite the stock being old, some 8 of the venues have been refurbished, including all the 1960's and 1980's centres. This does suggest a desire and commitment to maintain the venues, further underlining their importance as part of the overall facility stock.

21. However the continuing need for maintenance, refurbishment and possibly replacement of the stock will be important over the plan period and beyond.

Table 2: Supply of Indoor Bowling Centres in the Greater Norwich Area

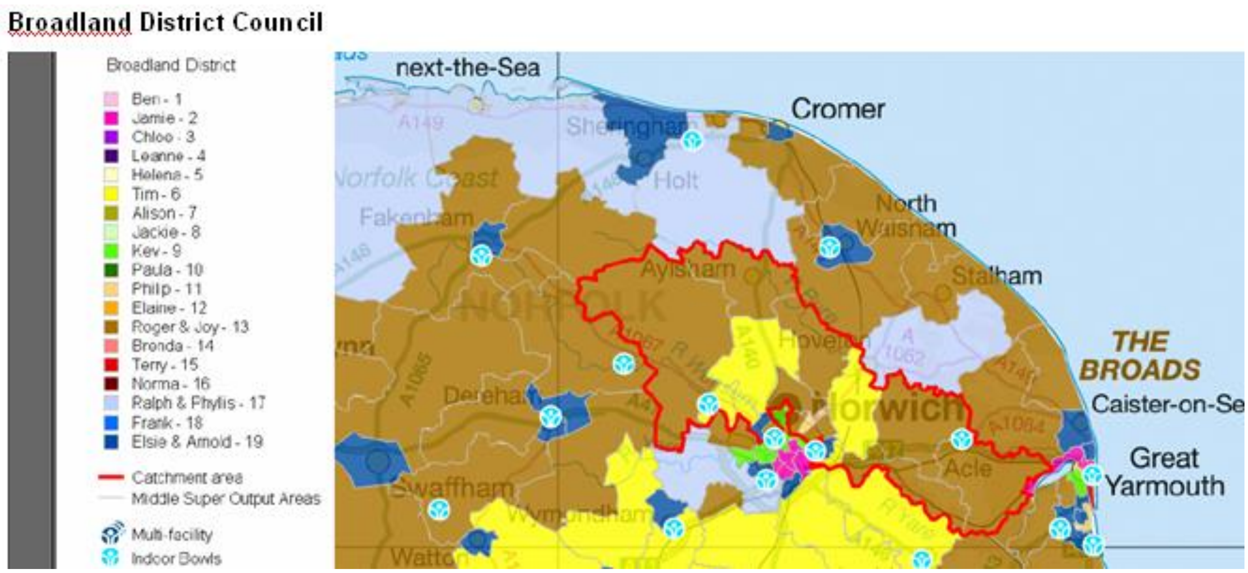
Site Name	Facility Type	Number of Rinks	Facility Status	Access Type	Ownership Type	Management Type	Year Built	Year Refurbished
Broadland								
ACLE INDOOR BOWLS CLUB	Indoor Bowls	6	Operational	Pay and Play	Sports Club	Commercial Management	1994	n/a
COUNTY ARTS INDOOR BOWLS CLUB	Indoor Bowls	6	Operational	Sports Club / Community Association	Sports Club	Sport Club	1962	2001
ROUNDWOOD BOWLS CLUB	Indoor Bowls	6	Operational	Sports Club / Community Association	Sports Club	Sport Club	1989	2006
Site Name	**Facility Type**	**Number**	**Facility Status**	**Access Type**	**Ownership Type**	**Management Type**	**Year Built**	**Year Refurbished**
Norwich								
NORFOLK BOWLING CLUB	Indoor Bowls	7	Operational	Sports Club / Community Association	Sports Club	Sport Club	1968	2011
NORMAN COMMUNITY CENTRE	Indoor Bowls	4	Operational	Pay and Play	Local Authority	Local Authority (in house)	1984	2008
Site Name	**Facility Type**	**Number**	**Facility Status**	**Access Type**	**Ownership Type**	**Management Type**	**Year Built**	**Year Refurbished**
South Norfolk								
DISS & DISTRICT INDOOR BOWLS CLUB	Indoor Bowls	4	Operational	Sports Club / Community Association	Sports Club	Sport Club	1966	2007
LODDON INDOOR BOWLS CLUB	Indoor Bowls	2	Operational	Pay and Play	Sports Club	Sport Club	1968	2011
SHOTFORD INDOOR BOWLS CLUB	Indoor Bowls	4	Operational	Pay and Play	Sports Club	Sport Club	1969	1997
WYMONDHAM DELL INDOOR BOWLS CLUB	Indoor Bowls	6	Operational	Pay and Play	Sports Club	Sport Club	1964	1998

Profile of participation for indoor bowling and location of centres for each of the Greater Norwich Districts - Broadland District

22. There are three centres located in Broadland; these are Acle Bowling Club, County Arts Bowling club and Roundwood Bowling Club. The location of each centre together with the market segment profile for Broadland district is shown in Map 1 overleaf. The location of each

centre is on the periphery of the authority and the dominate market segment spatially is Roger and Joy (dark brown shading) and Tim (yellow shading). Details of the profile for each of these market segments are set out in the section of the report on the sports participation profile for each authority.

Map 1: Location of indoor bowling centres in Broadland and dominate market segments



23. Details of the 2013 membership of each club together with the change in membership from 2012 has been provided by the Indoor Bowling Association and is set out in Table 3 below.

24. The membership ranges from 354 members Roundwood to 530 at County Arts. Each centre has 6 rinks and membership per rink is 59 members per rink at Roundwood 83 members per rink at Acle and 88 members per rink at County Arts Club.

Table 3: Membership details of indoor bowling clubs in Broadland

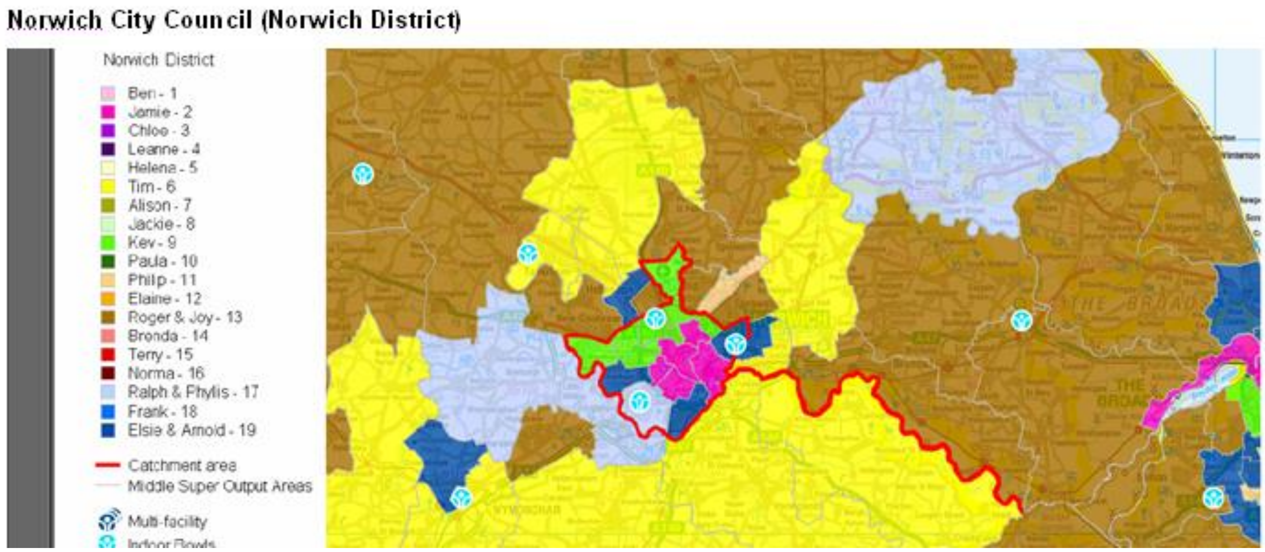
	men	ladies	Combined Figures 2013	2013 Change	Rinks	Members p Rink
Acle	344	155	499	-27	6	83
County Arts	382	148	530	-23	6	88
Roundwood	233	121	354	9	6	59

Profile of participation for indoor bowling and location of centres Norwich District

25. There are two centres located in Norwich; these are Norfolk Bowling Club and the Norman Community Centre. Only the Norfolk Bowling Club is affiliated to the Indoor Bowling Association. The location of each centre together with the market segment profile for Norwich district is shown in Map 2 overleaf. The dominate market segment spatially are Kiev (shaded lime green). Elsie and Arnold (shade dark blue) Jamie (deep red) and Ralph and Phyllis

(shaded light blue). Indoor bowling is an important activity for Elsie and Arnold and Ralph and Phyllis.

Map 2: Location on Indoor Bowling Centres and market segmentation profile Norwich



26. Details of the 2013 membership for the Norfolk Bowling Club is set out in Table 4 below (the Norman centre is not affiliated). The membership totals 531 members and the centre has seen a decline of 14 members since 2012. There are 76 members per rink, which is lower than at 2 of the Broadland rinks.

Table 4: Membership details of indoor bowling clubs in Norwich

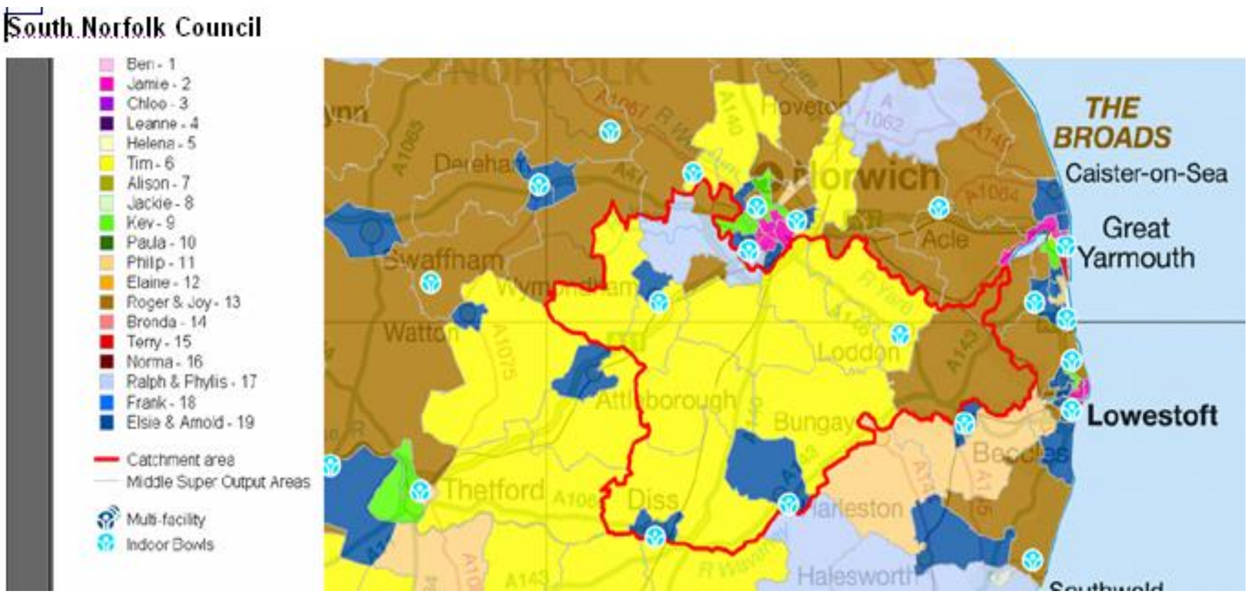
	men	ladies	Combined Figures 2013	2013 Change	Rinks	Members per Rink
Norfolk	337	194	531	-14	7	76

Profile of participation for indoor bowling and location of centres South Norfolk District

27. In South Norfolk there are four centres these being Diss and District Bowls Club, Loddon Indoor Bowls Club, Shotford Indoor Bowls Club and Wymondham Dell Indoor Bowls Club. Loddon Indoor Bowls Club is not affiliated to the Indoor Bowling Association. The location of each centre together with the market segment profile for South Norfolk is set out overleaf.

28. The dominate market segment spatially is very much Tim (shaded yellow) with small areas where Elsie and Arnold (shade dark blue), Ralph and Phyllis (shaded light blue) and Roger and Joy (shaded dark brown) are the dominate segments.

Map 3: Location on Indoor Bowling Centres and market segmentation profile South Norfolk



29. Details of the 2013 membership for the three affiliated clubs are set out in Table 5 below. The membership ranges from 220 members at Shotford, to 302 at Diss, to 406 at Wymondham. Both Diss and Wymondham have seen a decline of 21 and 20 members since 2012. The range for rinks per member is 55 at Shotford, 68 ay Wymondham and 76 at Diss. As an average across the sites South Norfolk has the lowest membership per rink of all the Greater Norwich authorities.

Table 5: Membership details of indoor bowling clubs in South Norfolk

	men	ladies	Combined Figures 2013	2013 Change	Rinks	Members per Rink
Diss	215	87	302	-21	4	76
Shotford	155	65	220	4	4	55
Wymondham	271	135	406	-20	6	68

Supply and demand for indoor bowling

30. In 2013 Sport England undertook a national assessment of the supply and demand for indoor bowling; this is on the same analysis basis as for swimming pools and sports halls. (Note: the mapping analysis was not undertaken and so it is data analysis only).

31. The key findings for each of the three Greater Norwich local authority areas and the findings for Norfolk County are set out in the tables below with a summary of key findings and implications.

Table 6: Total supply

	Broadland	Norwich	South Norfolk	Norfolk County
Number of IBC halls	3	2	4	22
Number of IBC sites	3	2	4	22
Supply of total IBC space in rinks	18	11	16	128
Supply of publicly available rinks (scaled with hrs avail in pp)	18.0	10.2	14.8	123.7
Supply of total IBC space in VPWPP	2808	1596	2313	19299
Rinks per 10,000	1.43	0.81	1.26	1.46

- There are 9 centres across the three authorities with Norwich having 2 centres, Broadland 3 and South Norfolk 4.

- In terms of the measure of rinks per 10,000 population, Broadland has the highest provision at 1.43 rinks, followed by South Norfolk at 1.26 and Norwich at 0.81. Al three authorities are below the provision for Norfolk County which is 1.46 rinks per 10.00 population. However the East Region figure is 0.54 rinks per 10.00 population and for England wide is 0.33 rinks.

  So based on the County comparator the Greater Norwich authorities are not well provided. However based on the Region and England wide measure the Greater Norwich authorities are considerably above the provision for indoor bowling centres.

Table 7: Total Demand

Total Demand	Broadland	Norwich	South Norfolk	Norfolk County
Population	126180	136074	126972	874729
Visits demanded –vpwpp	1636	1159	1620	10860
Equivalent in rinks	10.49	7.43	10.39	69.61
% of population without access to a car	10.9	32	11	17.9

- Norwich has the highest population but lowest demand for indoor bowling at equivalent to 7.4 rinks.

- The population for both Broadland and South Norfolk are very similar in 2013 and the demand for indoor bowling is virtually the same at 11 rinks.

- The difference in population and demand between Norwich and the other two authorities reflects the age structure of the population, in effect a slightly younger age population in Norwich so less demand for indoor bowling despite a higher total population. In Broadland and South Norfolk lower population totals but higher numbers of population in the participant age range for indoor bowling. The age bands for the highest indoor bowling participation are 49 – 64 years of age.

Table 8 - Supply and Demand Balance

Supply/Demand Balance	Broadland	Norwich	South Norfolk	Norfolk County
Supply - IBC provision (Rinks) scaled to take account of hours available for community use	18.0	10.2	14.8	123.7
Demand - IBC provision (Rinks)	10.5	7.4	10.4	69.6
Supply / Demand balance - Variation in IBC provision (rinks) available compared to the minimum required to meet demand.	7.51	2.8	4.44	54.1

- Supply and demand balance is assessed on the basis that all the demand for indoor bowling is met by all the supply within the same authority. In short it is not based on the catchment area of indoor bowling centres and participants using the nearest centre to where thy live irrespective of local authority boundaries. (Supply and demand findings based on the catchment area of centres is set out satisfied demand, unmet demand and used capacity).

- Based on the supply and demand assessment then all authorities have a greater supply of rinks than there is demand. Broadland's total demand exceeds supply by 7.5 rinks, in South Norfolk it is 4.4 rinks and in Norwich it is 2.8 rinks.

Table 9 - Satisfied Demand

Satisfied Demand	Broadland	Norwich	South Norfolk	Norfolk County
Total number of visits which are met	1541	1052	1503	9611
% of total demand satisfied	94.2	90.8	92.8	88.5
Demand Retained	1018	699	900	9203
Demand Retained -as a % of Satisfied Demand	66	66.5	59.9	95.8
Demand Exported	524	353	603	408
Demand Exported -as a % of Satisfied Demand	34	33.5	40.1	4.2

- Satisfied demand is defined as the amount of total demand which is located inside the catchment area of a centre and there is enough capacity to absorb the demand.

- All three authorities have very high levels of satisfied demand, with it being 94.2% of total demand in Broadland, 92.8% in South Norfolk and 90.8% in Norwich. These findings reflect the finding that total supply of indoor bowling centres are greater than total demand and the location of the demand is within the catchment area of a centre. So overall good levels of provision and centres which are accessible. These are higher percentages than in Norfolk County which is 88.5% of total demand.

- Based on the catchment area of centres and bowlers traveling to the nearest centre to where they live then Norwich is retaining 66.5% of the Norwich demand at its 2 centres.

Broadland is retaining 66% of its own demand at its 3 centres and South Norfolk is retaining 59.9% of its demand at its 4 centres.

- By contrast Broadland is exporting 34% of its own demand which is met at centres outside Broadland. Norwich is exporting 33.5% of its own demand and met outside Norwich and South Norfolk is exporting 40% of its demand and which is met outside South Norfolk. Overall high levels of exported demand and these can be met because there is a high level of indoor bowling centre provision.

Table 10 - Unmet Demand

Unmet Demand	Broadland	Norwich	South Norfolk	Norfolk County
Total number of visits in the peak, not currently being met	95	107	117	1248
Unmet demand as a % of total demand	5.8	9.2	7.2	11.5
Equivalent in Rinks	0.61	0.69	0.75	8
% of Unmet Demand due to ;				
Lack of Capacity -	2.0	3.4	2.9	0.7
Outside Catchment -	98.0	96.6	97.1	99.3

- Unmet demand has two definitions (1) unmet demand which cannot be met because there is not enough capacity to absorb the level of demand in the catchment area of a centre and (2) demand which is located outside the catchment are of a centre.

- Across all three authorities it is not a surprise given total supply exceeds total demand to find it is demand located outside the catchment area of an existing rink which is predominate at 98% of total unmet demand in Broadland, 96.6% in Norwich and 97.1% in South Norfolk. <u>This level of unmet demand equates to less than one rink in each authority.</u> To repeat however it is unmet demand which is locational and NOT unmet demand due to lack of indoor bowling capacity – supply is greater than demand.

- Given that the level of locational unmet demand is so low at less than one rink per authority then unmet demand for indoor bowling is not an issue in 2013.

Table 11 - Used Capacity

Used Capacity	Broadland	Norwich	South Norfolk	Norfolk County
Total number of visits used of current capacity	1793	1353	1507	9971
% of overall capacity of IBCs used	63.9	84.8	65.1	51.7
Visits Imported;				
Number of visits imported	775	654	607	768
As a % of used capacity	43.2	48.3	40.3	7.7

- Used capacity is an assessment of how full the centres based on the amount of the supply which is used in the weekly peak period.

- There is a high level of used capacity at the Norwich venues with used capacity averaging 84.8% of the total capacity in the weekly peak period. So whilst unmet demand is low and there is virtually none because of lack of capacity, the Norwich centres are edging towards where there could be a capacity issue with only 15% of unused capacity before the centres are estimated to be full. Any sustained increase in indoor bowling participation could create capacity issues in Norwich.

- In Broadland and South Norfolk the used capacity percentages of the centres are lower at 63.9% and 65.1% respectively. So there is good amount of unused opacity to be able to meet any increases in bowling participation.

- Imported demand is presented in the used capacity findings because it represents demand that is from outside the authorities but becomes part of the used capacity of the centres in the Greater Norwich authorities. The imported capacity percentages are high but most likely a lot of this imported demand is transfers between the Greater Norwich authorities themselves as distinct from other authorities and it is not possible to disaggregate the totals across authorities.

- Some 48% of the used capacity of the Norwich centres is imported from outside Norwich. Whilst 43% of the Broadland used capacity is imported and 40% of the used capacity of the South Norfolk centres is imported.

Table 12 - Relative Share

Relative Share	Broadland	Norwich	South Norfolk	Norfolk County
Score - with 100 = FPM Total (England and also including adjoining LAs in Scotland and Wales)	337	216	296	339
+/- from FPM Total (England and also including adjoining LAs in Scotland and Wales)	237	116	196	239

- In addition to the supply and demand assessment above, the analyses also sets out the relative share of access to indoor bowling centres – i.e. it takes into account the location of the population with the size and availability of facilities. It then assesses establish whether residents in one area have a greater or lesser share of provision than other areas, when compared against a national average (100).

- A simple analogy is to consider indoor bowling centres provision as a cake, its size being proportional to the facility's catchment and its slices divided among the users within the catchment.

- All three authorities have a very positive relative share of access to indoor bowling centres. Not a surprise given the high level of supply and lower than most local authorities' population levels. In Broadland the relative share of access to indoor bowling centres is 337 with the England wide average of access set at 100. So the Broadland population has a + 237 better access to Indoor bowling centres than England wide. In South Norfolk the positive relative share is +196 better than England wide. In Norwich it is lower but still 116 higher than the England wide average.

<u>National Governing Body consultation and assessment</u>

32. Consultation with the England Indoor Bowling Association has identified strong support for the provision of the affiliated centres in Greater Norwich. It is acknowledged by the Association

that Greater Norwich has a population profile which very much supports indoor bowling. In fact the Association undertakes their own use of the Sport England planning tools to prepare their market profile of sports participation in indoor bowling and to focus their interventions and support to where there is the greatest participation.

33. The Association provides support and technical guidance in the development of facilities but does not provide direct investment or grant aid. The Association acknowledges that all the centres are in need of modernisation. The Association assists affiliated clubs with grant aid applications to the Sport England Inspired Facilities Capital fund. Both Acle and Diss Indoor Bowls Clubs have considered applications but have not actually applied.

34. The association does not have its own assessment of the future demand for indoor bowing centres. However based on the profile of participation and an aging population across Greater Norwich it does consider there is a need to retain all the centres.

35. The focus should be to protect and support modernisation of the rinks on a business case basis. It does not consider there is a need for additional provision but is supportive of the need to re-provide if any of the centres should cease to operate. It does consider the greater need up to 2026 is to maintain and modernise the existing stock.

Summary of findings for indoor bowling centres and future need across Greater Norwich

Quantity of provision

- In 2013 there are 9 centres in total and all are operational. The total supply is 45 rinks. 7 of the centres operate as a pay and play access whilst 1 operates as club venues and 1 as a local authority venue.

- Based on the supply and demand assessment all authorities have a greater supply of rinks than there is demand. Broadland's total demand exceeds supply by 7.5 rinks, in South Norfolk it is 4.4 rinks and in Norwich it is 2.8 rinks. So based on the quantity of provision and supply and demand there is not a need for additional provision to meet projected demand.

- The Greater Norwich authorities have high levels of provision when compared to East Region and England wide. Based on the measure of rinks per 10,000 population, Broadland has 1.43 rinks, South Norfolk 1.26 rinks and Norwich at 0.81. The East Region figure is 0.54 rinks per 10, 000 population and for England wide is much lower at 0.33 rinks.

- All three authorities have very high levels of satisfied demand, with 94.2% of total demand met in Broadland, 92.8% in South Norfolk and 90.8% in Norwich. So overall good levels of provision and very high percentages of demand located within the catchment area of centres.

- There are 3 centres in Broadland, 2 in Norwich and 4 in South Norfolk. In terms of ownership 8 of the centres are club owned, with 1 owned by Norwich City Council.

Quality of provision

- The centres are quite old with 6 centres opened in the 1960's; 2 opened in the 1980's; and 1 opened in the 1990's. The youngest centre is the Acle Indoor Bowls Club opened in 1994 and so now some 20 years old.

- Despite the stock being old, some 8 of the total 9 venues have been refurbished, including all the 1960's and 1980's centres. This does suggest a desire and commitment to maintain the venues, further underlining their importance as part of the overall facility stock. However the continuing need for maintenance, refurbishment and possibly replacement of the stock will be important over the plan period and beyond.

- Both Acle and Diss Indoor Bowls Clubs have considered applications but have not actually applied to the Sport England Inspired Facilities Capital fund. Given the need to modernise club facilities the Greater Norwich authorities could consider supporting the Association and clubs with grand aid support.

Accessibility to centres and unmet demand

- Access to centres is very good and the location of the centres are well positioned to meet the demand in each of the three districts in Greater Norwich. Based on the catchment area of centres and bowlers traveling to the nearest centre to where they live then Norwich is retaining 66.5% of the Norwich demand at its 2 centres. Broadland is retaining 66% of its own demand at its 3 centres and South Norfolk is retaining 59.9% of its demand at its 4 centres.

- In terms of access and unmet demand which is located outside the catchment area of a centre this is not an issue. Given total supply exceeds total demand the unmet demand located outside the catchment area of an existing rink equates to less than one rink in each authority. To repeat however it is unmet demand which is locational and NOT unmet demand due to lack of indoor bowling capacity.

- Used capacity is an assessment of how full the centres based on the amount of the supply which is used in the weekly peak period. There is a high level of used capacity at the Norwich venues with used capacity averaging 84.8% of the total capacity in the weekly peak period. So whilst unmet demand is virtually none, the Norwich centres are edging towards where there could be a capacity issue with only 15% of unused capacity before the centres are estimated to be full. Any sustained increase in indoor bowling participation could create capacity issues in Norwich.

- In Broadland and South Norfolk the used capacity percentages of the centres are lower at 63.9% and 65.1% respectively. So there is good amount of unused capacity to be able to meet any increases in bowling participation.

Overall assessment up to 2026

36. The supply and demand and accessibility to indoor bowling centres up to 2026 based on the existing stock and the location means that the Greater Norwich authorities are well provided and these are not issues. The projected growth in population and its locations up to 2026 can be met by the capacity and locations of the existing centres and there is enough headroom is unused capacity as an average of 36% across the centres in Greater Norwich.

37. The central issue is the age of the stock and despite regular maintenance of the buildings the youngest centre is the Acle Indoor Bowls Club opened in 1994 and so now some 20 years old. There will be a continuing and increasing need to maintain and modernise the buildings. It is suggested the Greater Norwich authorities work with the Indoor Bowling Association and clubs to assist the clubs in capital grant aid applications to the Sport England Inspired Facilities Capital fund.

38. If a centre should close then there maybe a need to re-provide depending on the changes in membership of centres in years to come and the actual location of the centre which closes. The highest used capacity of centres is in Norwich and based on the 2014 pattern of provision this is the area which would most require re-provision should a centre close.

INDOOR TENNIS CENTRES

39. The supply and demand assessment for indoor tennis is from two sources. The supply assessment is from Active Places Power and is really applying the analysis capability from APP to provide some supply data on the levels and types of provision and then some comparative supply findings.

40. The demand assessment is based on the emerging new guidance produced by Sport England on Assessing Needs and Opportunities to replace the now withdrawn PPG 17 Companion Guide.

Supply assessment

41. There are 5 indoor tennis centres in the Greater Norwich area at 4 venues. Three venues are in Broadland whilst 1 venue is in South Norfolk but this has two centres, located at Easton College. One is a traditional 4 court indoor centre and the other is an air hall. There are no indoor tennis centres in Norwich.

42. The total number of courts across the 4 venues is 16 courts. Two of the venues located at the Norfolk Health and Racquets Club and Easton Sports and Conference Centre are air halls and the other venues are traditional structures. The air halls were opened in 2006 and 2008 respectively and are therefore quite modern.

43. In terms of access three venues are registered members use and one at Easton College is pay and play. Three venues are commercially owned and managed, whilst Easton College is opened and operated by the FE College.

Table 13: Indoor Tennis Centre Provision in Greater Norwich

Site Name	Facility Type	Facility Sub Type	Number of Courts	Access Type	Ownership Type	Management Type	Year Built	Year Refurbished
BROADLAND								
BANNATYNES HEALTH CLUB (NORWICH)	Indoor Tennis Centre	Traditional	2	Registered Membership use	Commercial	Commercial Management	1999	2011
THE NORFOLK HEALTH & RACQUETS CLUB	Indoor Tennis Centre	Traditional	4	Registered Membership use	Commercial	Commercial Management	2006	n/a
THE NORFOLK HEALTH & RACQUETS CLUB	Indoor Tennis Centre	Airhall	2	Registered Membership use	Commercial	Commercial Management	2006	n/a
Site Name	**Facility Type**	**Facility Sub Type**	**Number**	**Access Type**	**Ownership Type**	**Management Type**	**Year Built**	**Year Refurbished**
SOUTH NORFOLK								
EASTON SPORTS & CONFERENCE CENTRE	Indoor Tennis Centre	Airhall	4	Pay and Play	Further Education	School/College/University (in house)	2008	n/a
EASTON SPORTS & CONFERENCE CENTRE	Indoor Tennis Centre	Traditional	4	Pay and Play	Further Education	School/College/University (in house)	2009	n/a

44. The centres are quite modern, the oldest being the venue at Bannatynes Health Club in Broadlands opened in 1999 and refurbished in 2011. The other three venues opened between 2006 and 2008. So using age and refurbishment as a proxy measure for quality the centres would seem to be of good quality.

<u>Indoor tennis courts per 1,000 population</u>

45. The Active Places Power planning tool enables a comparison to be made with other local authority areas by benchmarking indoor tennis provision per 1,000 population. This is set out in Table 14 overleaf. (Note: the population totals have been sourced from Sport England's 2013 National Facility Assessment tables which is the same population data source applied in the other facility type's assessments).

46. The courts per 1,000 population findings for Broadland and South Norfolk compare very favorably with the Regional and England wide provision at 0.07 and 0.06 courts per 1,000 population, which is twice the England wide measure of provision. There is no provision in Norwich.

Table 14: Indoor tennis centre provision per 1,000 population

	Courts per 1000 population
Broadland	0.07
Norwich	0
South Norfolk	0.06
Greater Norwich	0.04
East Region	0.02
England	0.03

Quality

47. A quality assessment has been undertaken using data from Active Places Power on the date of construction and whether the facility has been refurbished, which is a useful proxy for quality. One centre was opened in the 1990's which opened in 1999 and was refurbished in 2011.

48. The remaining four sites opened in the 2000 decade and in a short period between 2006 – 2009. It is not possible to be definitive about quality and condition, but it is likely that the centres are in good quality, given their age and the oldest was modernised in 2011. Over the next few years there will be the need to modernise the 2000 decade centres and the split is 2 public and 2 commercial centres. It is more probable that funding for modernisation of the commercial centres is more achievable.

Tennis participation and demand assessment

49. The sports participation profile for the Greater Norwich authorities identified tennis (outdoor and indoor) as a sport which is second or third choice sport for the recreational player in the 30's – 45 age bands. Significantly it is a sport where there is a higher latent demand to play than there are actual tennis participants, when measured in the Active People survey.

50. The figures from the Active People market segmentation survey for APS 4 are set out below in Table 15 below. (Note these figures are for outdoor AND indoor tennis and are therefore more of a guide to indoor tennis participation and not specific. As a guide the LTA assessment is that for every 10 players who play outdoor tennis some 3-4 play indoors).

51. As can be seen, in all three authorities the number of people who would like to play tennis is at 7,317 is greater than those who do play at 6,756 people. This does suggest there is a high latent demand for tennis and one of the barriers to increased participation could be lack of facilities and which are accessible.

Table 15: Numbers of people who do play and would like to play tennis in each Greater Norwich authority

	Do Play Tennis	Would Like to Play Tennis
Broadland	2,314	2,382
Norwich	2,161	2,598
South Norfolk	2,281	2,337
Total	**6,756**	**7,317**

(Source Sport England Active People market segmentation data 2010)

Demand Assessment for Indoor Tennis

52. Sport England has not developed the facility planning model planning tool for indoor tennis and it does not collect data on participation to be able to develop a planning assessment as it does for sports halls, swimming pools and indoor bowling centres.

53. However in developing the new Assessing Needs and Opportunities Guide (ANOG) for indoor sports facilities which now adopted has replaced the withdrawn PPG 17 Companion Guide, there is a suggested methodology for assessing demand for indoor tennis and this is based on guidance from the LTA. This method has been adopted to assess the demand for indoor tennis in the Greater Norwich area and comparing the findings to current supply so as to provide an overall supply and demand assessment.

54. The extract from the Sport England ANOG is set out below.

> In '*Priority Project Funding, Policy and Operational Procedures*', the Lawn Tennis Association (LTA) states that one indoor court can serve 200 regular tennis players. The Active People Survey (APS6) found that 0.98% of adults regularly participate (once per week) in tennis[1].
>
> • Take adult population in the local authority area or catchment
>
> • Calculate 0.98% of the population
>
> • divide the figure by 200 = potential number of indoor courts required in local authority area or catchment
>
> Assess the finding against the supply data and other demand parameters e.g. NGB priorities etc to establish need and develop policy – *protect, enhance, provide.*

(Source: Sport England Assessing Needs and Opportunities Consultation Draft January 2014)

55. Based on this demand assessment the findings for each of the Greater Norwich authorities are compared with the supply and are set out in Table 16 overleaf for 2014 and 2026.

56. The findings on applying this LTA demand assessment is that there is a surplus of 2 courts in both Broadland and South Norfolk and a deficit of 6 courts in Norwich in 2014. So a deficit of 2 courts overall and all within Norwich.

57. Based on the projected population change up to 2026 and assuming the supply of courts and locations remains unchanged, the population growth changes the supply and demand assessment. There remains a surplus in each of Broadland and South Norfolk but it is now 1 court in each authority. The deficit in Norwich has increased by 1 court to a total of 7 courts. So overall there is a deficit of 5 courts across Greater Norwich by 2026 but all within Norwich.

58. The LTA assessment is based on the local authority population and boundaries. Given the close proximity of the Broadland and South Norfolk supply to Norwich then based on the catchment area of the centres and their drive time it is reasonable to assume that the overall supply of 16 courts at the four locations can meet the Norwich demand and there is a deficit of 2 courts across Greater Norwich, not the 6 based on the Norwich boundary. (Note: the Bannatynes Centre and the Norfolk Health and Racquets Club in Broadland were approached about catchment area data for their centres/membership but declined to share this information).

Table 16: Supply and demand assessment for indoor tennis based on the LTA assessment method for 2014

Name of Authority	2014 population	0.98% of 2014 population	÷ 200 (people need for a court)	No of courts demand based on LTA	No courts supply in 2014	Supply (+) or deficit (-) over 2014 supply
Broadland	126,974	1,244	6.2	6	8	(+) 2
Norwich	137,675	1,340	6.4	7	0	(-) 6
South Norfolk	128,277	1,257	6.2	6	8	(+) 2

Table 17: Supply and demand assessment for indoor tennis based on the LTA assessment method for 2026

Name of Authority	2026 population	0.98% of 2026 population	÷ 200 (people need for a court)	No of courts demand based on LTA	No courts supply in 2026 (1)	Supply (+) or deficit (-)as at 2026
Broadland	138,031	1,352	6.7	7	8	(+) 1
Norwich	149,729	1,467	7.3	7	0	(-) 7
South Norfolk	144,160	1,412	7	7	8	(+) 1

Notes (1) supply assumed to be unchanged between 2014 and 2026

National Governing Body consultation and assessment

59. The comments received from consultations with the Lawn Tennis Association related mainly to outdoor tennis courts and the LTA is currently working with the City Council to maximize the usage of and the improvements to the existing park courts. Norwich is one of the LTA's four priority areas in East Region. The LTA view is that if this is successful in increasing participation it may created the need/demand for, and likely sustainability of indoor courts.

60. The LTA does not have any Greater Norwich indoor tennis centre project it is looking to invest in. The LTA has recently invested in Eaton Park, and will continue to investigate the potential opportunity for, and probable return from, further investment. As Norwich City is one of the priority areas across the Region it is more likely to be the area/centres when the LTA identifies specific projects.

Summary of findings for indoor tennis centres

Quantity of provision

- Based on the Sport England Active Places Power database of current supply there are 5 indoor tennis centres in the Greater Norwich area at 4 venues. Three venues are in Broadland whilst 1 venue is in South Norfolk but this has two centres, located at Easton College. One is a traditional 4 court indoor centre and the other is an air hall. There are no indoor tennis centres in Norwich.

- The total number of courts across the 4 venues is 16 courts, with two venues having 4 courts (8 courts at Easton College) and two venues having 2 courts.

- Two of the venues at The Norfolk Health and Racquets Club and Easton Sports and Conference Centre are air halls and the other venues are traditional structures. The air halls were opened in 2006 and 2008 respectively and are therefore quite modern.

- The courts per 1,000 population findings for Broadland and South Norfolk compare very favorably with the Regional and England wide provision at 0.07 and 0.06 courts per 1,000 population, which is twice the England wide measure of provision.

Quality of provision

- The 4 sites/centres are modern with 3 sites opened in the period 2006 - 2009 centres and so 75% of the sites in Greater Norwich are between 5 – 8 years old, with the remaining site opened in 1999. It is a modern stock of centres.

- Three of the five individual centres are traditional build structures and 2 are air halls, the air halls contain 6 of the total 16 courts and were constructed in 2006 and 2008.

Accessibility and unmet demand

- In terms of access three venues are registered members use and the one venue and two centres at Easton College are pay and play. Three venues are commercially owned and managed, whilst Easton College is opened and operated by the FE College.

- Based on this demand assessment for indoor tennis proposed by Sport England in new needs and opportunities guidance and applying the LTA demand assessment methodology, there is a surplus of 2 courts in both Broadland and South Norfolk and a deficit of 6 courts in Norwich.

- When assessed against current supply across the whole Greater Norwich area there is an overall deficit of 2 courts but this is all contained with Norwich. The LTA assessment is based on the local authority population and boundaries. Given the close proximity of the Broadland and South Norfolk supply to Norwich then based on the catchment area of the centres it is unlikely to show this high a deficit for Norwich and an overall Greater Norwich deficit of 2 courts presents a more realistic assessment.

HEALTH AND FITNESS

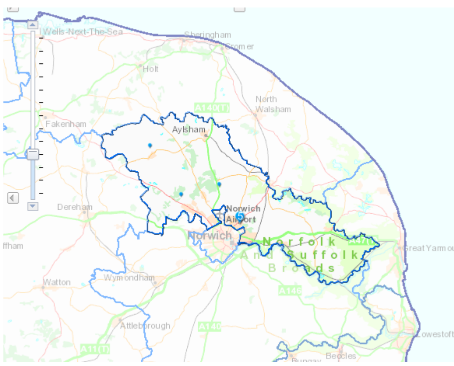
61. Sport England defines health and fitness suites as those facilities providing fitness stations for both cardiovascular and strength training, more commonly known as gym, and excludes spaces for aerobics and dance activities. The assessment below is based before on the strategic planning tools available from Sport England and the Fitness Industry Association to assess the supply and demand for health and fitness provision.

<u>Location of health and fitness provision and type of provision</u>

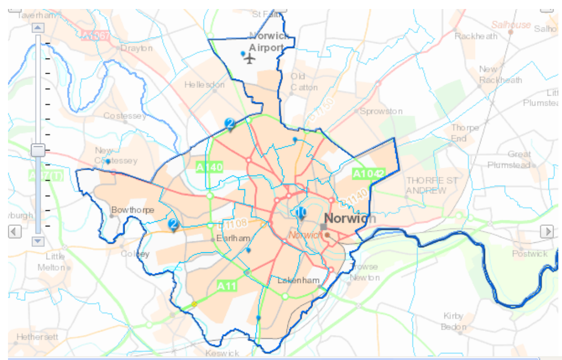
62. Map 4 below shows the location of the existing health and fitness centres across each of the three authorities. The blue dot is the site location of the health and fitness centres.

Map 4: Location of Health and Fitness Centres in Broadland, Norwich and South Norfolk

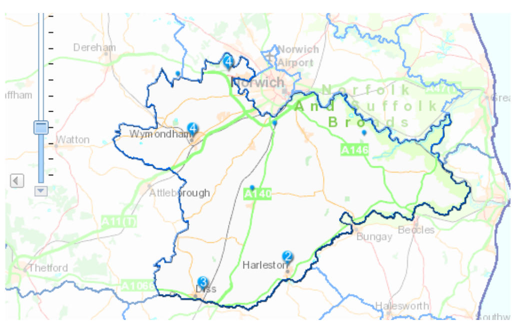
Broadland



Norwich



South Norfolk



63. In total there are 42 health and fitness venues providing a total of 1,772 health and fitness stations across the area. 4 of the venues are currently closed. Of the venues which are open, 9 are local authority owned and managed but none In Broadland. Nine are on education sites and owned and managed whilst 19 are owned and managed by the commercial sector.

64. In terms of the type of provision in each local authority area this is set out in Table 18 overleaf. The provision is quite balanced in Norwich and South Norfolk at 19 and 15 venues each and then a lower 8 venue in Broadland, mainly because there is no local authority provision.

Commercial makes up the bulk of the provision at 19 of the total 42 venues followed by 9 sites by both local authority and education.

Table 18: Health and fitness provision by local authority and type of provider

	LA	Education	Commercial	Other	Total
Broadland	0	1	6	1	8
City of Norwich	2	5	9*	2	19
South Norfolk	7	3	4	1	15
Greater Norwich Area	9	9	19	4	42

***** UEA SportsPark classified as commercial

Age and refurbishment of health and fitness centres

65. The age and number of centre refurbished is set out in Table 19 below. As can be seen the vast majority of the centres were opened in the 2000 – 10 decade when 13 centres opened. There have been 2 centres opened post 2010 these being The Gym and Wensum Sports Centre in 2012 and 2013.

66. In terms of refurbishment the 2 centres built in the 1970's have been refurbished but only 2 of the 6 1980's centres. There is a noticeable pick up with 8 of the 11 1990's centres refurbished and 6 of the 2000 - decade centres refurbished. This reflects the increase in commercial provision in these two decades and the need to maintain good quality provision in the increasing commercial market.

Table 19: Age and Refurbishment of Health and Fitness Centres

Age	Number of centres opened	Number of centres refurbished
1970's	2	2
1980's	6	2
1990's	11	8
2000's	13	6
Post 2010	2	0

Ownership, management, type of access, year built and refurbishment

67. A list of all the centres, number of stations, ownership and management and the type of access and year built is set out in Table 20 overleaf for each of the three authorities. The majority of the provision is commercial venues at 19 venues. Local authority and education provision is equal at 9 venues each. Whilst others which is predominantly sports clubs makes up 4 venues.

Table 20: Health and Fitness Centres - number of stations, ownership and management, type of access and year built/refurbished

BROADLAND Site Name	Number	Facility Status	Access Type	Ownership Type	Management Type	Year Built	Year Refurbished
BANNATYNES HEALTH CLUB (NORWICH)	155	Operational	Registered Membership use	Commercial	Commercial Management	1999	2008
MARRIOTT LEISURE & COUNTRY CLUB (SPROWSTON MANOR)	20	Operational	Registered Membership use	Commercial	Commercial Management	1991	2004
OASIS SPORTS & LEISURE CLUB (THORPE)	72	Operational	Registered Membership use	Commercial	Commercial Management	1982	n/a
OLD BREWERY HOUSE HOTEL (CLOSED) <u>Not included in the s and d assessment</u>	25	Closed	Pay and Play	Commercial	Not Known	1985	n/a
SPROWSTON SPORTS HALL & SWIMMING POOL	11	Operational	Pay and Play	Community school	School/College/University (in house)	2009	n/a
ST FAITH'S CENTRE (NORWICH)	20	Operational	Registered Membership use	Community Organisation	Community Organisation	n/a	n/a
THE NORFOLK HEALTH & RACQUETS CLUB	60	Operational	Registered Membership use	Commercial	Commercial Management	2006	n/a
WENSUM VALLEY HOTEL GOLF & COUNTRY CLUB	65	Operational	Registered Membership use	Commercial	Commercial Management	1990	2008
NORWICH Site Name	**Number**	**Facility Status**	**Access Type**	**Ownership Type**	**Management Type**	**Year Built**	**Year Refurbished**
BODY RUSH	57	Operational	Pay and Play	Commercial	Commercial Management	1996	2006
CITY ACADEMY NORWICH	17	Operational	Sports Club / Community Association	Academies	School/College/University (in house)	2007	n/a
DIMENSIONS FITNESS (NORWICH)	90	Operational	Pay and Play	Commercial	Commercial Management	2001	2007
HEALTH CENTRAL HEALTH AND FITNESS (NORWICH)	31	Operational	Pay and Play	Commercial	Commercial Management	1990	2008
MERCURE NORWICH HOTEL	10	Operational	Registered Membership use	Commercial	Commercial Management	1991	2007
NORMAN COMMUNITY	32	Operational	Pay and Play	Local Authority	Local Authority (in house)	1976	2005

CENTRE							
NORWICH CHURCH OF ENGLANDS YOUNG MENS SOCIETY SQUASH CLUB	21	Operational	Sports Club / Community Association	Community Organisation	Community Organisation	1985	n/a
NORWICH FITNESS & WELLBEING CENTRE	105	Operational	Registered Membership use	Other	Other	2001	2007
NORWICH HIGH SCHOOL FOR GIRLS	8	Operational	Private Use	Other Independent School	School/College/University (in house)	2000	n/a
NORWICH SCHOOL	18	Operational	Sports Club / Community Association	Other Independent School	School/College/University (in house)	2001	n/a
NOTRE DAME HIGH SCHOOL	9	Operational	Private Use	Voluntary Aided School	Other	1984	n/a
RIVERSIDE LEISURE CENTRE (NORWICH)	100	Operational	Pay and Play	Local Authority	Commercial Management	2003	2008
SEWELL PARK COLLEGE	21	Operational	Pay and Play	Community school	Local Authority (in house)	1996	n/a
SPIRIT HEALTH CLUB (NORWICH)	23	Operational	Registered Membership use	Commercial	Commercial Management	1986	2011
SPORTSPARK	140	Operational	Pay and Play	Higher Education Institutions	School/College/University (in house)	2000	2009
THAI WELLBEING (CLOSED) Not included in the s and d assessment	16	Closed	Registered Membership use	Commercial	Not Known	2005	n/a
THE BROOK HOTEL) Not included in the s and d assessment (CLOSED)	15	Closed	Pay and Play	Commercial	Not Known	1989	2011
THE GYM (NORWICH)	125	Operational	Pay and Play	Commercial	Commercial Management	2012	n/a
WENSUM SPORTS CENTRE	10	Operational	Private Use	Community Organisation	Community Organisation	2013	n/a
South Norfolk							
Site Name	**Number**	**Facility Status**	**Access Type**	**Ownership Type**	**Management Type**	**Year Built**	**Year Refurbished**
CARREFOUR HEALTH & BEAUTY (NORWICH)	140	Operational	Registered Membership use	Commercial	Commercial Management	2000	2006
DE VERE LEISURE CLUB (DUNSTON HALL)	74	Operational	Registered Membership use	Commercial	Commercial Management	1996	2003
DISS SWIM & FITNESS CENTRE	23	Operational	Pay and Play	Local Authority	Local Authority (in house)	1987	2001
EASTON SPORTS & CONFERENCE CENTRE	34	Operational	Registered Membership use	Further Education	School/College/University (in house)	1998	2010
FIT CLUB (DISS)	41	Operational	Pay and Play	Commercial	Commercial Management	2002	2005

FIT CLUB (WYMONDHAM)	41	Operational	Registered Membership use	Commercial	Commercial Management	2007	n/a
FITNESS EXPRESS AT PARK FARM COUNTRY HOTEL	47	Operational	Pay and Play	Commercial	Commercial Management	1991	1999
HARLESTON COMMUNITY LEISURE FACILITY	37	Operational	Pay and Play	Local Authority	Local Authority (in house)	2003	n/a
HEYWOOD SPORTS & LEISURE CLUB	24	Operational	Registered Membership use	Sports Club	Sport Club	1977	2011
LANGLEY SCHOOL	25	Operational	Sports Club / Community Association	Other Independent School	School/College/University (in house)	2006	n/a
LONG STRATTON LEISURE CENTRE	20	Operational	Pay and Play	Local authority	Local Authority (in house)	1983	2012
ORMISTON VICTORY ACADEMY (CLOSED) Not included in the s and d assessment	5	Closed	Private Use	Academies	Not Known	1999	n/a
THE EDGE HEALTH & FITNESS CLUB AT BARNHAM BROOM HOTEL	26	Operational	Pay and Play	Commercial	Commercial Management	1995	2007
THE ELIXIR ROOMS	7	Operational	Registered Membership use	Commercial	Commercial Management	2008	n/a
WYMONDHAM COLLEGE	6	Operational	Private Use	Foundation School	School/College/University (in house)	2005	n/a
WYMONDHAM LEISURE CENTRE	50	Operational	Pay and Play	Local authority	Local Authority (in house)	1992	2012

68. In terms of type of access, there is a very close balance between pay and play at a total of 841 stations and registered membership/commercial membership provision at 850 stations, with only 81 stations at sports clubs and one venue at Norwich High School for Girls which has private use at 8 stations.

69. In terms of locations, Norwich has the highest provision at 724 stations, followed by 589 stations at South Norfolk and then 459 stations in Broadland. All this information on type of access and by each local authority area is set out in Table 21 below.

Table 21: Type of use/access of health and fitness centres by number of stations and by locations

	Pay & play	Reg members	Sports Club	Total
Broadland	11	392	56	459
Norwich	586	138	0	724
South Norfolk	244	320	25	589
Total	841	850	81	1,772

Assessment of demand for health and fitness centres

70. Sport England does not have a planning tool which assesses the demand for health and fitness centres. However the owever H Fitness Industry Association (FIA) has devised a model that provides guidance on the supply of stations against the current anticipated demand.

71. 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 tomes are identified as Monday – Friday 6pm – 10pm and Saturday and Sunday, 12pm – 4pm.

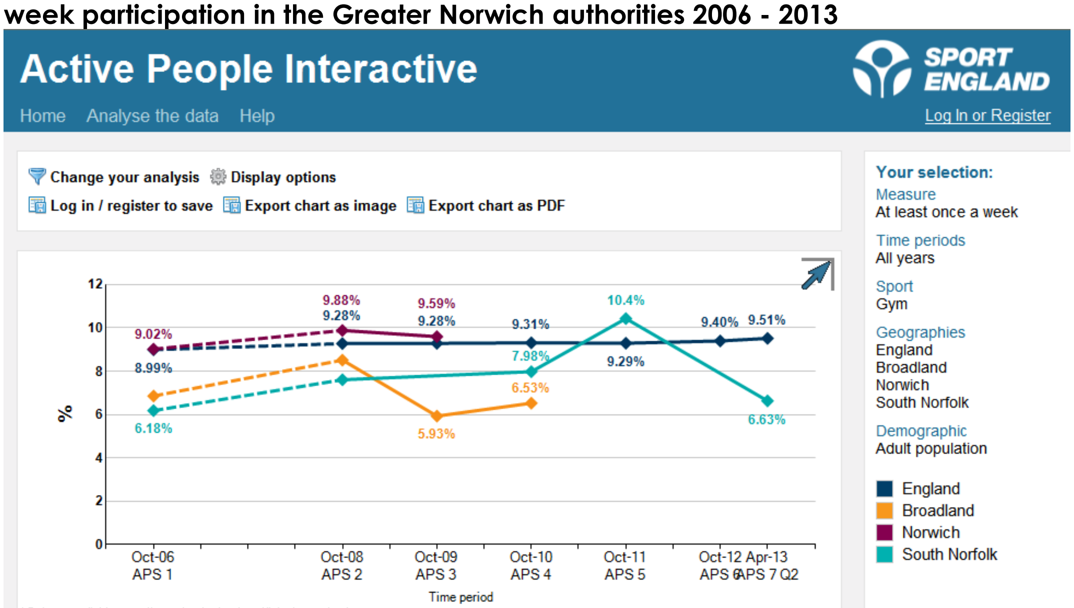
72. For modelling purposes, it is assumed that 65% of the total weekly usage occurs at the busiest (peak) time periods. Based on research with health and fitness operators it has been assumed that the average member/user visits the facility 2.4 times per week.

73. Sport England's Active People Survey has been used to understand the percentage of the population participating in health and fitness. Nationally, Active People findings up to AP 7 show that 9.5% of the adult population participates in health and fitness on a weekly basis – this figure has been used to reflect the local situation in the Greater Norwich area.

74. The findings on the percentage of the population who participate in gym activites based on participation at least once a week and over the period of 2006 – 2013 for England wide and for each of the three Greater Norwich authorities is set out in Chart 1 below. As can be seen there is quite a variation in the participation rate for the Greater Norwich authorities. Also the data is not available for some of the APS years for Broadland and Norwich.

75. Whereas the national rate of gym participation is complete over the APS years and does show a more consistent trend in participation. Consequently the national rate of participation has been applied in the demand assessment. It is acknowledged this is a higher rate than for the Greater Norwich authorities.

Chart 1: Rate of gym participation based on Sport England Active People Survey of once a week participation in the Greater Norwich authorities 2006 - 2013



76. The FIA assessment method is applied and set out in Table 22 below to assess the current demand for health and fitness stations in each of the districts and then for the Greater Norwich area.

77. Tables 22 and 23 show that based on the FIA a total of 1,715 stations are required during the peak time period to accommodate current levels of demand over the whole area (541 stations in Broadland, 647 stations in Norwich and 528 stations in South Norfolk). According to Active Places Power the current total supply across the three authorities is 1,772 stations.

78. Based on the current distribution of the stations there is a deficit of 82 stations in Broadland based on the FIA measurement and surplus of 77 stations in Norwich and a surplus of 61 stations in South Norfolk. However IF all the centres were equally available to the wider community, there would be an adequate supply of fitness facilities over the Greater Norwich area with a Greater Norwich surplus of 56 stations but with the surpluses and deficiencies within each district as set out.

Table 22: Assessment of demand for health and fitness stations for each local authority in the Greater Norwich based on the FIA assessment method

	Broadland		Norwich		South Norfolk	
Standard	Value	Total				
Population (over 16)		102,300		122,400		99,600
% of population participating in health and fitness	9.5 %	9,718		11,628		9,462
Average number of visits per week	2.4	23,323		27,907		22,708
No. of visits in peak time	65%	15,159		18,139		14,760
No. of visits on one hour of peak time	28	541		647		527
Total number of stations required (peak times)		541		647		528
Number of current stations, based on Active Places Power 2013		459		724		589
Surplus (+) or deficit (-) in number of stations required		**- 82**		**+ 77**		**+ 61**

Table 23: Assessment of demand for health and fitness stations for Greater Norwich based on the FIA assessment method

	Greater Norwich	
Standard	**Value**	**Total**
Population (over 16)		324,300
% of population participating in health and fitness	9.5%	30,808
Average number of visits per week	2.4	73,940
No. of visits in peak time	65%	48,061
No. of visits on one hour of peak time	28	1716
Number of current stations, based on Active Places Power 2013		1,772
Surplus (+) or deficit (-) in number of stations required		**+ 56**

Summary of findings for Health and Fitness Centres

Quantity of provision

- Across the Greater Norwich area there are 42 health and fitness venues, of which 38 are open providing a total of 1,772 health and fitness stations.

- In terms of availability for the community use, there is a quite even split between pay and play use at 841 stations and 850 stations for registered members on commercial sites, and only 81 stations at sports clubs or other access.

Quality of provision

- In terms of the age of health and fitness centres only 8 of the centres were built before 1990 and all of these 4 centres have been refurbished. 15 centres have been built post 2,000 and of these 6 have already been refurbished, this reflects the increasing amount of commercial provision and need to maintain high quality provision to remain competitive and provide a quality facility, both within the different markets of pay and play and membership centres.

- Some 85% of the total provision over 8 years old has been refurbished. Within the commercial sector provision al of the centres with the exception of 2 venues have been refurbished and modernised. This reflects the very competitive position of commercial centres and maintain quality to attract and retain membership.

Demand assessment

- Based on the current distribution of the stations there is a deficit of 82 stations in Broadland based on the FIA measurement and surplus of 77 stations in Norwich and a surplus of 61 stations in South Norfolk. However IF all the centres were equally available to the wider community, there would be an adequate supply of fitness facilities over the Greater Norwich area with a Greater Norwich surplus of 56 stations.

- The supply and demand assessment is an indication of the scale and location of deficits and surpluses. Future gym provision is market driven and for the public sector as part of the new or re-provision of a sports hall or swimming pool project. This so as to provide critical mass and improve the core business case for a gym as an integrated part of a new multi purpose facility. Within the strategy and action plan section these opportunities for new gym provision integrated into a pool or sports hall project is set out

VILLAGE HALLS

79. Village and community halls are an important local recreational resource. They can be venues for local sports and recreation clubs, or places to meet and socialise. In rural areas that lack immediate access to purpose built sports hall they often represent a vital hub for the community.

80. It is recognised that the Greater Norwich supply and demand assessment of the need for sports halls will not be able to meet all the demand for sports halls in rural areas and therefore the provision of village and community halls in meeting some of the demand and providing a supply base for indoor sports and more so for physical activity is an important resource. So it is

important to understand what role village and community halls can play in meeting the provision for indoor sport and physical activity.

Survey of Village and Community Halls

81. Active Norfolk on behalf of naa organised an on line survey of village halls in the two districts of Broadland and South Norfolk. There are no village halls in City Of Norwich but there are community centres and the findings regarding this facility type is reported on next.

82. The survey was sent to the Active Norfolk Village Games co-ordinators. The survey was live between beginning of December 2013 and end of January 2014. Responses were received from 30 village games co-ordinators which represents a response rate of 38%.

83. There can also be village halls which are not provided by town or parish councils and are not included in our survey, ranging across: church halls: including Salvation Army, Church of England, Baptist and Methodist and church-related halls where hired out for general public use; WI halls and scout halls. These were not included in the survey.

84. The findings from the village hall survey are overlaid on the fpm assessment of supply and demand for sports halls. It is NOT proposed that sports halls will be built in lots of rural areas. The purpose of the overlay is to identify the scale and location of unmet demand for sports halls in rural areas then overlay these findings with location of the major village halls. By so doing it allows a view to be formed on the match between unmet demand and the opportunities to increase access/capacity at the village halls in these areas.

85. In short, to what extent and what opportunities are there for the existing supply of village halls to provide some indoor space for physical activity and possibly sport in the areas of greatest need.

86. The first part of the village hall report sets out the findings from the survey. The second part relates these findings to the fpm analysis of supply and demand for sports halls up to 2026 and the scale and location of unmet demand for sports halls in rural areas.

Village hall survey topics

87. The online survey asked the following questions/topics:

- Does your village have a village hall which is used for sport or physical activity?
- If so which sports or physical activities is the village hall used for.
- Which are the most popular activities and why?
- How many hours a week is the village hall used for sport and physical activity with seasonal variations identified?
- What are the constraints on providing more sport and physical activity? (the prompt list of possible constraints were size of the village halls, quality, and lack of changing accommodation. Also constraints which are activity based so prompts on other competing activities for time or no one to organise/do the activity, despite a demand for it)

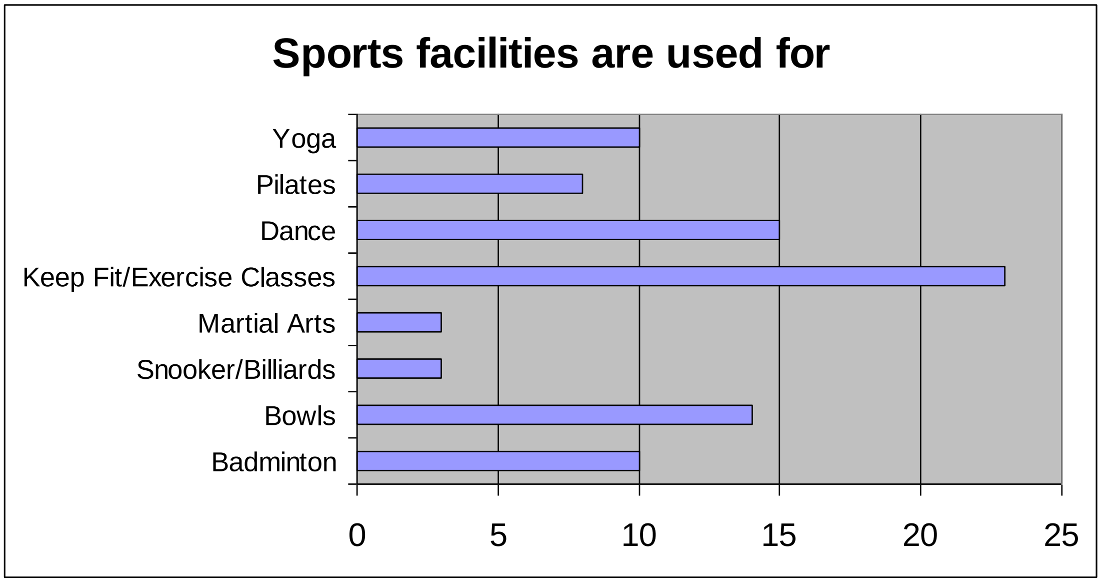
- What are the dimensions of the village hall and the area where sport or physical activity takes place?

- What are the opportunities to increase sport and physical activity – and for which activities?

- The full postcode for the village hall

Village hall survey findings

Topic: Which sports or physical activity is the village hall used for?



88. As can be seen keep fit and dance is the most popular activites with 23 responses citing this as the main activity, with a further 15 responses also including dance. Short mat carpet bowls was the third most popular activity.

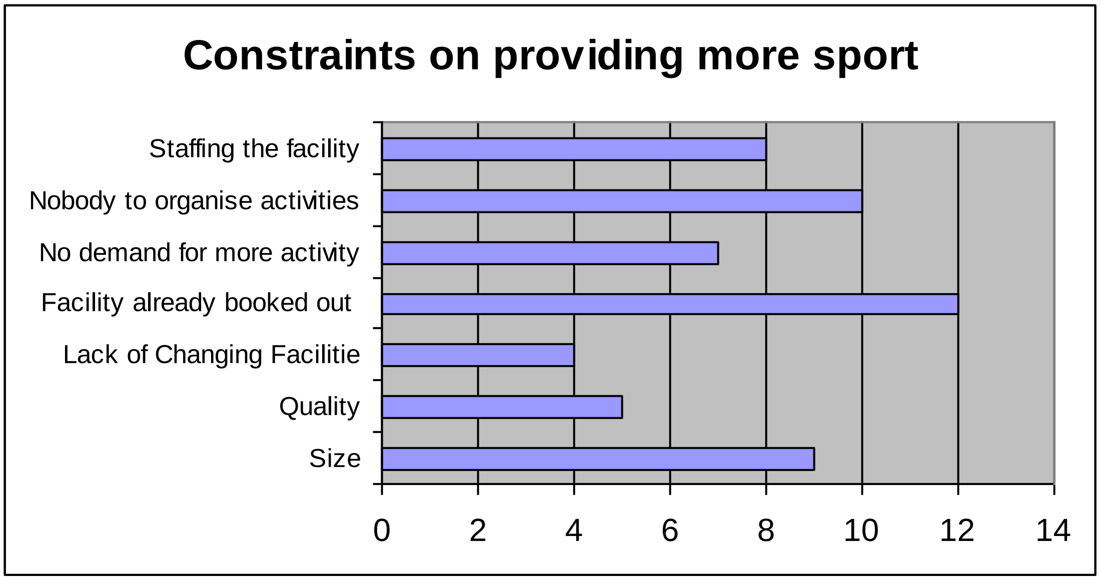
89. Overall the types of activity are not a surprise. It is not sport based but physical activity based with and dance/keep fit and exercise classes. This does very much suggests the main activites are female based, reinforced by 10 respondents also including yoga and 8 including Pilates.

90. Other individual comments included:

- Keep Fit, is popular because the hall has a stage for instructor to work from; and

- Table tennis is popular, because it fits in with the size limitations of the venue, is easily organised, and at little cost.

Topic: What are the constraints on providing more sport and physical activity? (respondents asked to include all that applied)



91. Of interest is that competing time or demand from other activites is preventing more sports and physical activity taking place, with 12 respondents citing this constraint. Quite possibly the constraint is activites all wanting the peak weekday evenings.

92. Perhaps surprising is that size of the village hall and quality are not the biggest constraints and the constraints are more demand and people based such as nobody to organise the activity and staffing.

93. Other comments received were also demand and people based:

- Lack of community awareness of facilities, recently numbers have dropped for circuits
- Not enough volunteers to run the clubs.

Topic: What are the opportunities for increasing sport and physical activity – and for which activities?

94. There was a very wide range of responses under opportunities to increase activity and it was not possible to group them into a few broad headings. Main responses were around

- financial opportunities such as use of S106 monies to build/improve existing building;
- changes in organising programmes and bookings so moving away from individual let's to block bookings of table tennis, zumba, pilates and short mat bowls. Setting up block bookings of 6 weeks or more provides continuity and people commit;
- better advertising and new instructors more dynamic. Competition with other locations for dance and keep fit classes has meant had to be more dynamic; and

- decline in other activites has created more space for dance and exercise. These are more popular than book club or bridge club.

Facility planning model assessment for sports halls in the Greater Norwich area in 2014 and 2026

95. The facility planning model assessment of the level of unmet demand for SPORTS HALLS did not identify high levels of unmet demand.

96. The key findings from the 2014 assessment of supply and demand for sports halls were

- the total demand located outside the catchment area of a sports hall in 2014 totals just over 8 badminton courts across Greater Norwich.

97. The breakdown is 3 badminton courts in Broadland and Norwich and 2 courts in South Norfolk. There are 30 badminton courts available for public use in some or all of the weekly peak period in Broadland, 48 courts in Norwich and 43 badminton courts in South Norfolk.

98. The assessment of the supply and demand for sports halls in 2026 does not change the findings from the 2014 assessment much at all and the key findings are:

- across Greater Norwich the total unmet demand in 2026 is estimated to be 1825 visits. This is a small increase of 151 visits over the 2014 total of 1,674 visits. Unmet demand in 2026 equates to 9.7% of total demand and is just over 11 badminton courts, when assessed on courts available for public use.

99. The unmet demand breakdown is 3 courts in both Broadland and Norwich and just under 5 badminton courts in South Norfolk. So overall the "gap" that village and community halls can play in meeting a demand for sports and physical activity which cannot be provided by sports halls is low.

Accessibility to sports halls (and role played by village halls)

100. As important as the supply and demand assessment is the ACCESS to sports halls based on where people live and the location of the sports halls based on walking and (more importantly for rural areas) drive time catchments. The 2014 facility planning model assessment on access are illustrated in Map 5 overleaf. The key findings are:

- Overall access to sports halls based on car travel is quite good, with only the edge of the SE and NW of Broadland outside the drive to catchment area of any sports hall (shown in Map 5 overleaf).

- In most of the land area of Broadland and South Norfolk residents have access to between 1 – 5 sports halls based on a 20 minute drive time catchment of sports hall locations. In the more urban areas around Norwich residents have access to 5 – 10 sports halls based on the car drive time catchment area (area shaded cream in Map 5 overleaf).

- The dominate travel mode to sports halls is by car with 83% of all visits to venues in Greater Norwich area by car. The range is 91% in Broadland and 92% in South Norfolk and a lower 69% in Norwich.

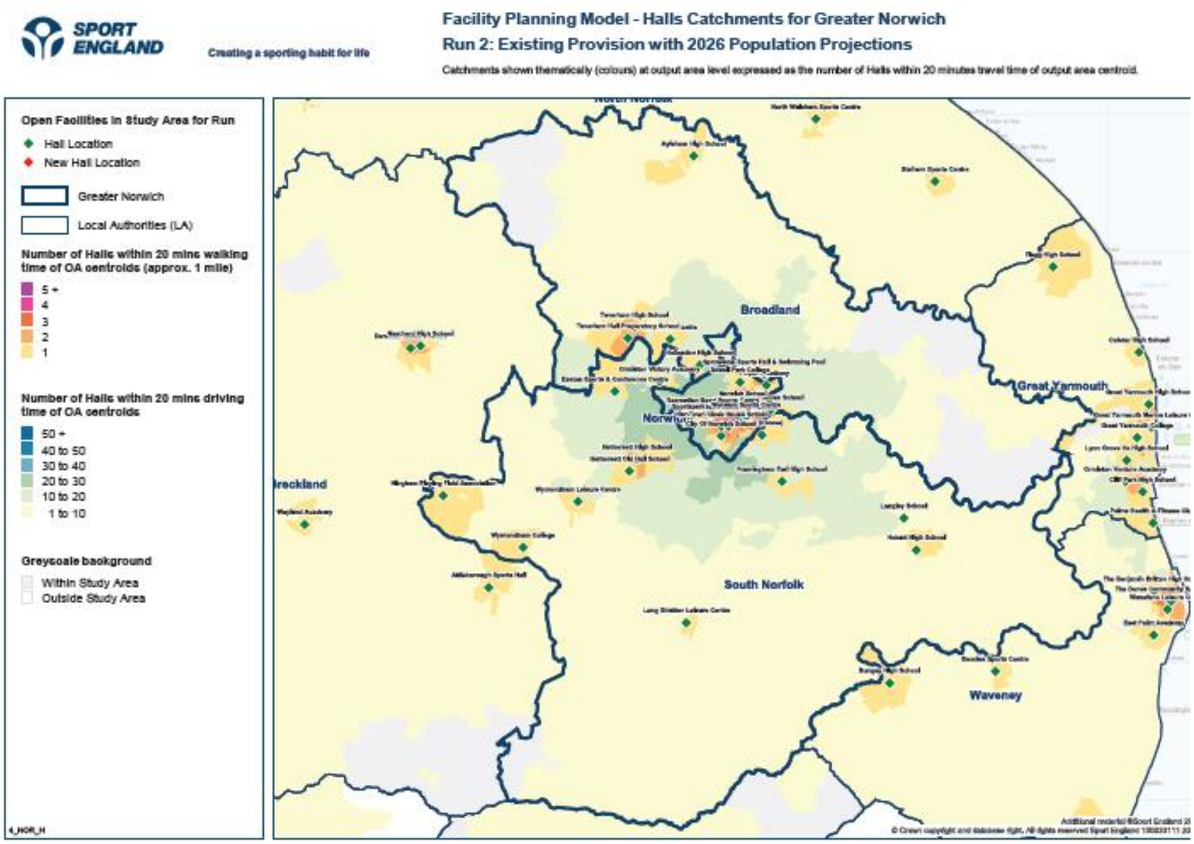
Opportunities for village halls to meet the gaps in provision of sports halls

101. In terms of the village halls and opportunities to plug gaps in unmet demand for sports halls, the most important finding from the fpm assessment is the areas of Broadland which are outside the drive to catchment area of an existing sports hall.

102. In terms of where this population is located this is shown in Map 5 below, it is the areas shaded grey and showing the base layer map. These areas do not really change between 2014 and 2026. In short the 2026 assessment is that the grey shaded areas are the ones with least access to sports halls.

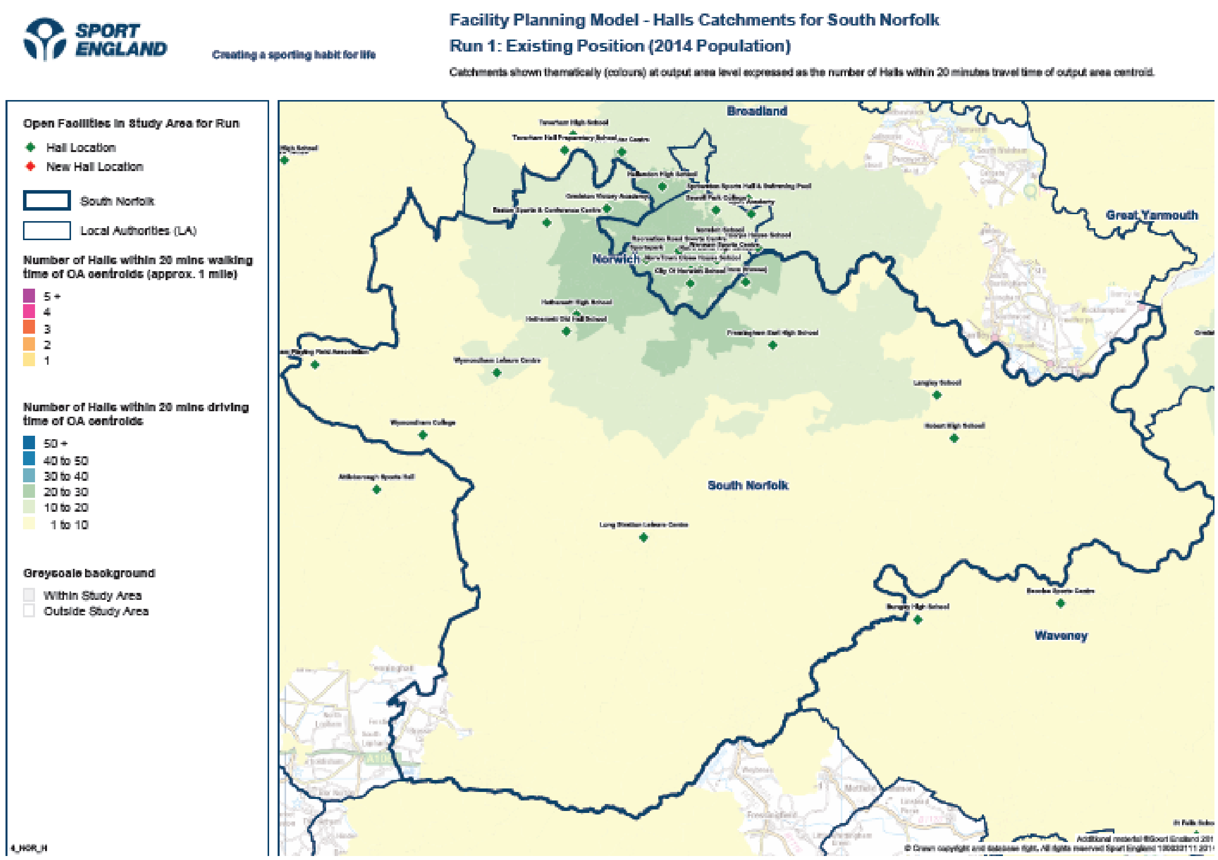
103. So is there any scope for any village halls in these areas to provide any capacity for playing of indoor sports, or more likely physical activity.

Map 5: Access to sports halls based on the 20 minute drive time catchment area Broadland District 2026



104. In terms of South Norfolk there is only one very small area in the furthest corner of the SW of the district which is outside the drive to catchment area of any sports hall in 2014. It is suggested the size of this area does not allow for any consideration of provision. Hopefully however the map is helpful to the District Council in identifying the area of the authority with least access to indoor sports facilities and any interventions to increase access should consider this area as the priority.

Map 6: Access to sports halls based on the 20 minute drive time catchment area South Norfolk District 2014



Summary of key finding from the village halls survey and relationship to the facilities planning model

105. The survey was sent to the Active Norfolk Village Games co-ordinators. The survey was live between beginning of December 2013 and end of January 2014. Responses were received from 30 village games co-ordinators which represents a response rate of 38%.

- **Most popular activities** – keep fit and dance is the most popular activites with 23 responses citing this as the main activity. With a further 15 responses also including dance. Short mat carpet bowls was the third most popular activity.

- Overall the types of activity are not a surprise. It is not sport based (and unlikely given the size of the village halls) but physical activity with and dance/keep fit and exercise classes. This does suggest the main activites are female based, reinforced by 10 respondents also including yoga and 8 including pilates.

- **Constraints** - competing time or demand from other activites is preventing more sports and physical activity taking place, with 18 respondents citing this as the biggest constraint. Quite possibly the constraint is activites all wanting the peak weekday evenings.

- Perhaps surprising is that size and quality of the village hall are not the biggest constraints, mentioned by 8 respondents as the biggest constraint. Other constraints are: few people to organise the activity; and lack of community awareness of facilities.

- **Opportunities -** there was a very wide range of responses under opportunities and it was not possible to group them into a few broad headings. Main responses were around: Financial opportunities such as use of S106 monies to build/improve existing building; changes in organising programmes and bookings so moving away from individual lets to block bookings of table tennis, zumba, pilates and short mat bowls; setting up block bookings of 6 weeks or more provides continuity and people commit; better advertising and new instructors more dynamic.

Relationship of facility planning model findings for sports halls to meeting demand for sports and physical activity in rural areas in village halls.

106. The key finding is the fpm assessment does not identify a high level of unmet demand for sports halls ACROSS GREATER NORWICH in either urban or rural areas.

107. The key findings from the 2014 assessment of supply and demand for sports halls are;

- the total demand located outside the catchment area of a sports hall in 2014 totals just over 8 badminton courts across Greater Norwich; and

- the breakdown is 3 badminton courts in Broadland and Norwich and 2 courts in South Norfolk. There are 30 badminton courts available for public use in some or all of the weekly peak period in Broadland, 48 courts in Norwich and 43 badminton courts in South Norfolk.

108. The assessment of the supply and demand for sports halls in 2026 does not change the findings from the 2014 assessment much at all and the key findings are:

- across Greater Norwich the total unmet demand in 2026 is estimated to be 1825 visits. This is a small increase of 151 visits over the 2014 total of 1,674 visits. Unmet demand in 2026 equates to 9.7% of total demand and is just over 11 badminton courts, when assessed on courts available for public use; and

- the unmet demand breakdown is 3 courts in both Broadland and Norwich and just under 5 badminton courts in South Norfolk. So overall the "gap" that village and community halls can play in meeting a demand for sports and physical activity which cannot be provided by sports halls is very low.

109. In terms of the village halls and opportunities to plug gaps in unmet demand for sports halls, the most important finding from the fpm assessment is the SW and NE areas of Broadland which are outside the drive to catchment area of an existing sports hall. This is shown in the maps below for 2014 and 2026 above and is the areas shaded grey and showing the base layer map. These areas do not really change in the 2026 assessment.

110. So based on the strategic assessment of demand, supply and accessibility to sports halls the findings on the level of unmet demand are very low across Greater Norwich and isolated to two small areas of Broadland and one very small area of South Norfolk which are outside the drive to catchment are of a sports hall.

111. Relating these findings to the village hall survey suggests that there is not a big issue in capacity of village halls to met current or unmet demand for physical activity and sport. There is not a high level of unmet demand, at just 11 badminton courts and this is across all of Greater Norwich in 2026. The constraints at the village halls are very much about people to organise and manage activity programmes. It is much less about the actual provision, size and location of village halls.

112. Given this overall assessment, then the purpose of relating the sports hall findings to the village hall survey has not materialized as an issue to address. The key presumption was that there would be a higher unmet demand for sports halls in rural areas than has been shown to be the case. Given unmet demand is only 11 badminton courts across all of the Greater Norwich area in 2026, there is not the need to make strategic interventions in key rural locations where there are hot spots of unmet demand for sports halls so as to establish if village halls can accommodate more demand.

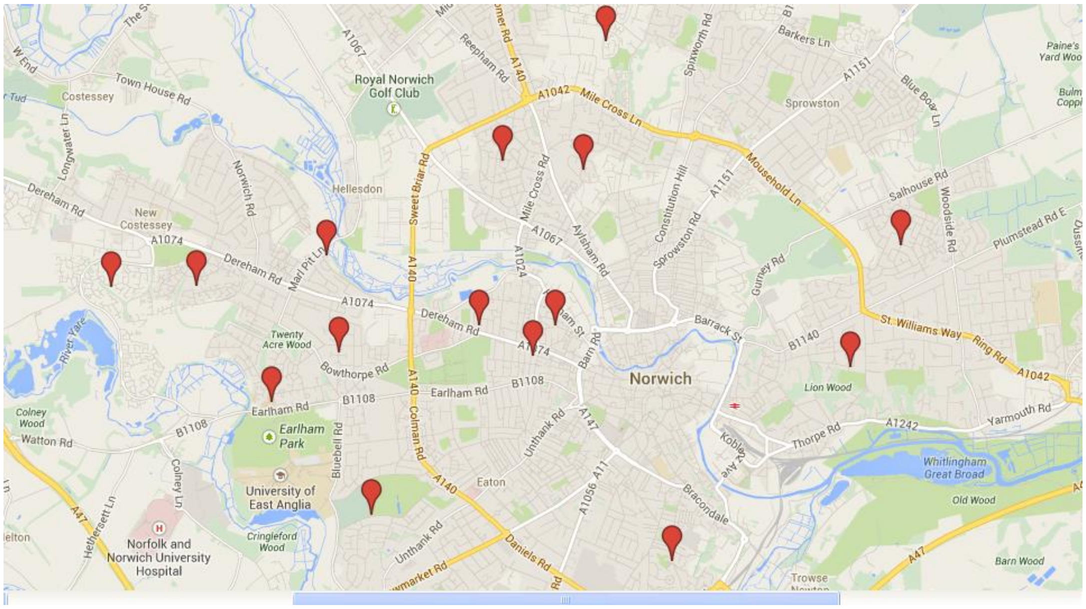
COMMUNITY CENTRES

113. Norwich City Council has 16 community centres across the city and these are managed by local community associations. Community centres provide a venue for a variety of social, educational, recreational and local neighbourhood activities.

114. The City Council supports the centres by providing community development officers who offer guidance and support to the community associations. This could involve: attending meetings of the managing group; supporting its members; offering advice on issues affecting the centres; giving advice on organising activities in suggesting the type of activity and how it might be planned and run; help with fund-raising. The City Council also maintains the buildings.

115. A map of the city showing the spot location of each centre is set out as Map 7 overleaf.

Map 7: Spot location of the Norwich Community Centres



- Belvedere Community Centre
- Cadge Road Community Centre
- Catton Grove Community Centre
- Chapel Break Community Centre
- Clover Hill Community Centre
- Eaton Park Community Centre
- Frere Road Community Centre
- Greenfields Community Centre
- Harford Community Centre
- Jubilee Community Centre
- Marlpit Community Centre
- The Norman Centre
- Pilling Park Community Centre
- Russell Street Community Centre
- Wensum Community Centre
- West Earlham Community Centre

116. It is important to understand the extent to which these multi purpose venues provide for sporting and recreational use. Also to compare this assessment with the demand for sports halls in the facility planning model assessment and if there is scope for any unmet demand for sports halls to be met by more extensive use of the community centres for sport and recreation.

117. The range and type of sporting and physical activites undertaken in the centre over a four week period in February – March 2014 is set out overleaf as Table 24. As the table shows dance ranging across ballroom, tap, ballet and zumba is the most popular activity with 10 venues providing for dance activites and up to 54 hours a week. Fitness and exercise classes are the next most popular group of activites at 6 venues and up to 29 hours of use per week. Then indoor carpet bowls with 5 venues providing up to 23 hours of activity a week. Finally yoga and pilates is the next most popular with 6 venues providing up to a total of 18 hours a week of activites.

Table 24: Range and types of sporting and physical activites undertaken at the Norwich Community Centres February – March 2014

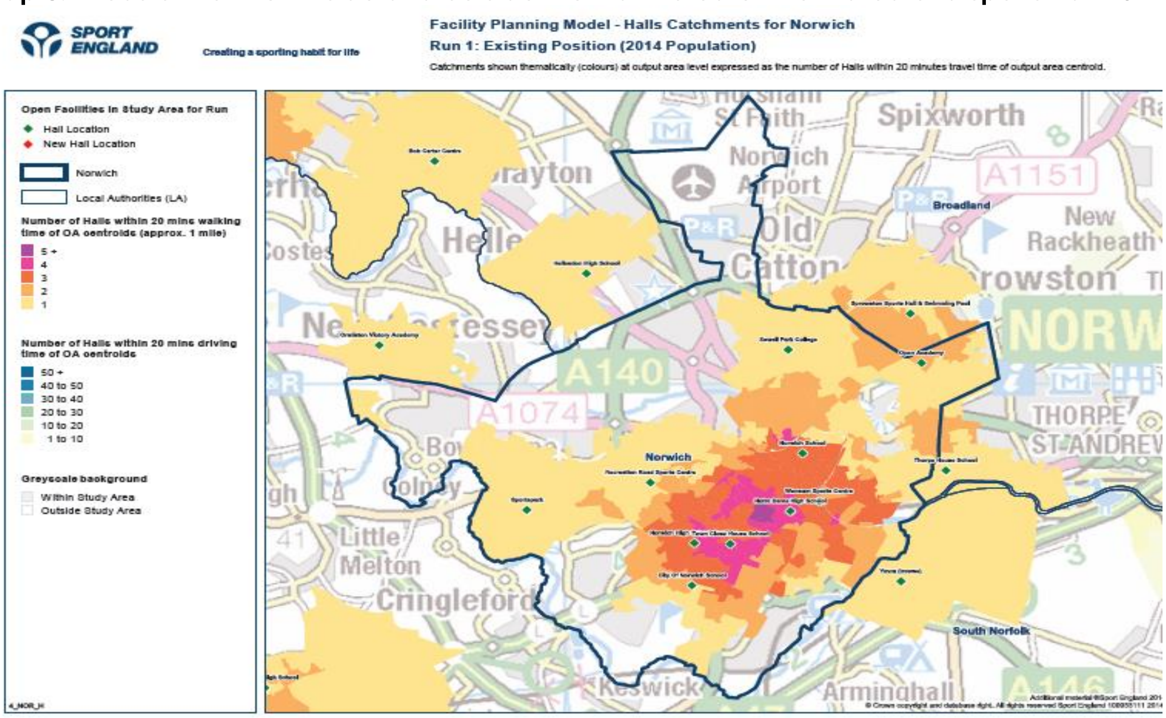
Type of activity	Venues	Total hours per week (over February – March 2014 survey period)
Dance	10	54
Indoor Bowls	5	23
Yoga/pilates	6	18
Fitness circuits	6	29
Martial Arts	4	18
Table Tennis	1	14

Access to venues

118. Of significance is that the estimate is that in Norwich 32% of the population in 2014 do not have access to a car and this is estimated not to change up to 2026. Furthermore the estimate is that 20% of all visits to sports halls are by walking. As context for the Norwich findings the figures for Broadland and South Norfolk are that 11% of the population does not have access to a car and some 5% and 7% of all visits to sports halls are estimated to be by car.

119. The areas of Norwich which are OUTSIDE the walking catchment of a sports hall in 2014 is illustrated in Map 8 below and as can be seen it is the NW and SW of the authority which is outside the walk to catchment area.

Map 8: Areas of Norwich inside and outside the walk to catchment area of a sports hall 2014



120. So the considerations are:

- What is the level of unmet demand for sports halls in 2014 and how does this change up to 2026?

- Where is the location of unmet demand for sports halls and does it relate to the areas of the city outside the walk to catchment area? If so is there scope for more increased use of community centres in these areas to meet the demand for sport halls.

Demand and unmet demand for sports halls in Norwich in 2014 and 2026

121. A summary of the demand and unmet demand for sports halls is set out in Table 25 below. This shows that overall the total demand for sports halls which cannot be met is 2. 9 badminton courts in 2014 and 3.3 badminton courts in 2026 (row in blue), In effect very low levels of unmet demand.

122. Of interest of this total unmet demand some 87% in 2014 and 83% in 2026 is demand which is located outside the walk to catchment area of a sports hall. So there is a relationship with unmet demand and location. However the total unmet demand is only 3 badminton courts (rounded) in both years.

Table 25: Demand and unmet demand for sports halls in Norwich in 2014 and 2026

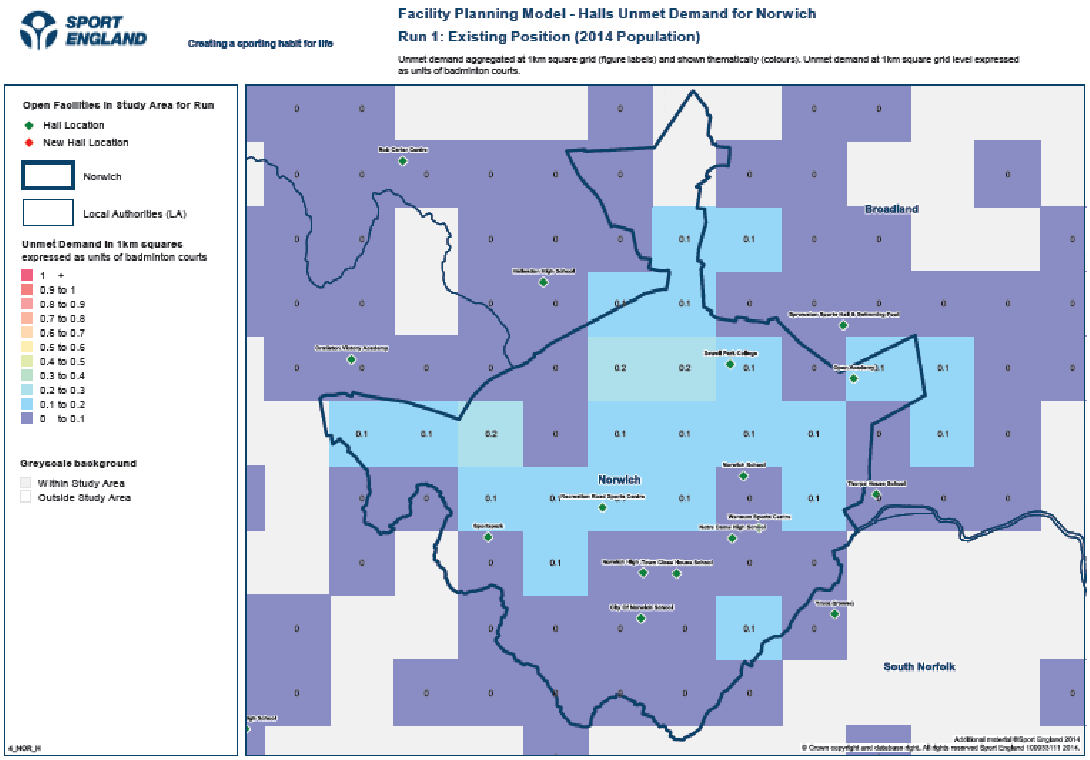
Unmet Demand	Norwich 2014	Norwich 2026
Total number of visits in the peak, not currently being met	471	547
Unmet demand as a % of total demand	7	7.5
Equivalent in Courts - with comfort factor	2.9	3.38
% of Unmet Demand due to ;		
Lack of Capacity -	13	17.1
Outside Catchment -	86.99	82.92
Outside Catchment;	86.99	82.92

123. In terms of the location of unmet demand this is set out in Map 9 overleaf and is for 2014 but it is virtually unchanged up to 2026 in numbers and locations. The indigo coloured squares are the areas with the lowest values of unmet demand and these have values between 0 – 0.1 of a badminton court. In these squares the value is 0 so whilst there is some unmet demand in terms of its amount it is not enough to get to the lowest value of 0.1 of a badminton court.

124. The light blue squares have values of between 0.1 – 0.2 of one badminton court. The mid shade blue squares are areas where there is unmet demand which equates to between 0.1 – 0.2 of one badminton court and these are in the centre of the city. The highest value squares are the 2 light blue squares with values of between 0.2 – 0.3 of one badminton court in the centre of the city.

125. In relation to the areas of the city which are outside the walk to catchment area of a city the unmet demand does not really correlate – not at all in the SW of the city where there is no unmet demand and in the NW there is at best unmet demand of 0.2 of a badminton court.

Map 9: Location and scale of unmet demand for sports halls in Norwich in 2014.



Summary of findings

126. Across 10 of the 18 Norwich community centres they are providing a total of up 156 hours of use a week for predominantly physical activities, and some sports activity mainly indoor bowls.

127. There is not a correlation between the locations of the community centres and the locations of unmet demand for sports hall across Norwich. So there is no scope for the centres to act as a more accessible venue for sports and physical activity for Norwich residents located outside the walking catchment area of a sports hall. However the unmet demand for sports located outside of the walking catchment area is estimated to be only 3 badminton courts by 2026 and so the scale of unmet demand is not an issue.