



# **SUNDERLAND CITY COUNCIL INDOOR SPORTS FACILITIES**

## **ASSESSMENT REPORT**

**DECEMBER 2015**

**Integrity, Innovation, Inspiration**

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# SUNDERLAND CITY COUNCIL BUILT LEISURE AND SPORTS ASSESSMENT REPORT

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**SUNDERLAND CITY COUNCIL**  
**BUILT LEISURE AND SPORTS ASSESSMENT REPORT**

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## **EXECUTIVE SUMMARY**

This is the Executive Summary of Sunderland City Council's (SCC) Built Leisure and Sports Assessment Report and whilst SCC has been the key driver in developing it, it is expected that plans and actions emanating from it can only be delivered in partnership with other key stakeholders.

### **Purpose**

The purpose of the Built Leisure and Sports Assessment Report is to look to set out 'where Sunderland is now' by identifying issues/challenges facing SCC, stakeholders and partners. The report makes recommendations on, for example:

- ◀ Surpluses or deficiencies of facilities within Sunderland.
- ◀ Opportunities for re-location.
- ◀ Proposals for new provision including the quality of provision required.

The Assessment Report takes account of the range of sport and leisure providers and recognises the importance of a range of agencies including the Foundation of Light, Sunderland University, Everyone Active, Tyne and Wear Sport and a range of national governing bodies of sport (NGBs) plus local clubs. It is recognised that the health agenda needs to be a major consideration moving forward but it is also acknowledged that the health sector has many conflicting and competing demands on its resources.

### **Policy context**

The Corporate Plan identifies the vision for Sunderland is to be a smart, sustainable city synonymous with the North East and a high performing and admired council. Its purpose is to ensure Sunderland is a place where people can fulfil their ambitions and potential. There are three key themes of People, Places and Economy and each has a number of corporate outcomes. The core message running through local strategies are:

- ◀ The requirement that opportunities are made available to/for all Sunderland residents to take part in physical activity which will contribute positively to the health and wellbeing of all residents.
- ◀ There will be increasing pressure on finances and resources within SCC as local government finance is put under further pressure (especially non statutory services).
- ◀ SCC will need to work with partners to ensure that facilities and infrastructure are provided to support sustainable communities in Sunderland.
- ◀ There are good facilities and programmes which contribute to the education and skills development of the local population.
- ◀ Facilities and programmes of activity will continue to contribute to reducing health inequalities across the City for all age groups.

This will only be achieved via targeting increasingly scarce resources. It is, thus, essential that indoor sports halls and health and fitness venues are accessible and available to the community and that the 'offer' is developed based on the needs of local communities.

## **Sunderland**

The City of Sunderland is a local government district of Tyne and Wear situated in the North East of England. It is bordered by the authorities of South Tyneside, Gateshead and County Durham. It is named after its largest settlement Sunderland but covers a far larger area including the towns of Hetton-le-Hole, Houghton-le-Spring, Washington and a range of suburban villages.

The city had a population of 275,300 at the 2011 census; the majority of which (174,286) reside in Sunderland itself. Life expectancy in Sunderland is lower than the national figure for both men and women. Relative to other parts of the country Sunderland experiences high levels of deprivation; over half of the City's population (52.5%) falls within the areas covered by the country's three most deprived cohorts compared to a national average (30%). A similar pattern is seen in relation to health (yet more so) as almost three quarters of Sunderland's population (73.1%) falls within the areas covered by the three most deprived cohorts, which again compares to a national average of c.30%

## **Methodology**

The Assessment Report is predicated on an in-depth needs assessment of indoor provision which is based on the Sport England Assessing Needs and Opportunities Guide (ANOG) for Indoor and Outdoor Sports Facilities. This guide provides a recommended approach to undertaking a robust assessment of need for indoor and outdoor sports facilities. It has primarily been produced to help local authorities meet the requirements of the Government's National Planning Policy Framework. The work undertaken includes:

- ◀ Consideration of all Sunderland's indoor sports core facilities including education, private and voluntary sites and those within neighbouring boroughs (excluding swimming pools).
- ◀ Visits and assessments of the standard range of indoor facilities.
- ◀ Production of a local authority-wide needs assessment providing clear understanding of current and future (to 2025) supply and demand issues for indoor facilities in terms of quantity, quality and location.
- ◀ Production of a robust evidence base to support development of planning policy guidance.
- ◀ Recommendations and priorities to assist the Authority and stakeholders to make future investment decisions.
- ◀ Identification of priority projects for investment to deliver key outcomes, and provide evidence and support for bids to external funders.
- ◀ Clarification of the role of the Authority, professional clubs and the education sector in meeting community demand for indoor dry sports facilities.
- ◀ Addressing the needs of specific sports within the local area - as identified in the scope.

## BUILT SPORTS PROVISION

The following table is a synopsis of the key challenges and issues identified for the different indoor facilities considered within the assessment report.

Facility type	Summary of key challenges and issues
Sports halls	<ul style="list-style-type: none"> <li>There is more demand for sports hall space in Sunderland than is currently available.</li> <li>NGBs report that they are restricted from developing their sport fully due to the lack of indoor sports hall availability.</li> <li>There is restricted community use at many schools across the City. In most instances schools are open during term time only and also close for exams.</li> <li>Due to the fragmentation of the education sector it is unlikely that there will be a substantial increase in the amount or coordination of community use available at school sites.</li> <li>The diverse management arrangements of facilities lead to variations in quality, programming, access and pricing.</li> <li>There is lack of availability of sports halls in neighbouring authorities for Sunderland residents.</li> <li>The proposed closure of the Seaburn Centre will exacerbate the need for sports hall space - this will add displacement of bookings and further demand to that latent demand already found in the area.</li> </ul>
Health & Fitness and studios	<ul style="list-style-type: none"> <li>There are a wide range of Health and Fitness operators in the City offering different levels of pricing and access.</li> <li>The reach of facilities operated by Everyone Active appears to be good for both the more densely populated and sparsely populated areas of Sunderland.</li> <li>Facility modelling indicates that there are sufficient stations for the size of the population (especially so, following the current high levels of investment in health &amp; fitness equipment).</li> <li>The effect of the investment on the health and fitness market remains to be seen; it will still be necessary to ensure that those who can benefit most from the facilities will have access to them (i.e. it is important to get the sedentary, active and the least active more active).</li> <li>There are 49 studios based at 30 different sites; but there is no national or regional standard to which this can be compared.</li> <li>Studios can play a really important part linking to the wider health agenda, such as the links between the PCT and Everyone Active at the Bunnyhill Wellness Centre. Due to the disparate nature of the management of studios, it will be difficult to co-ordinate the sport and physical activity offer within them.</li> <li>It is nonetheless important that they are considered and used to engage the hard to reach groups, in particular, and help ensure that sedentary get active and the least active get more active.</li> </ul>
Squash	<ul style="list-style-type: none"> <li>Squash is played at a mix of public and private venues in Sunderland and are located in areas of relatively high population density.</li> <li>The distribution of courts is relatively small with only seven courts in the City, of which two are in the public sector and five in the private sector.</li> <li>Court space offers a level of flexibility and the space can be used for table tennis and a range of exercise and fitness classes.</li> </ul>
Indoor bowls	<ul style="list-style-type: none"> <li>The City has one indoor bowls facility but there are opportunities to participate at a further 10 rinks located within an estimated 20 minute drive time of Houghton-Le-Spring.</li> <li>There is still scope for increasing participation given the projected increase in older people in the City.</li> <li>No leisure manager, from across the City, indicated an unmet demand for carpet or short mat bowls in other venues.</li> <li>The projected increase in residents age 65+ is an opportunity to increase participation trends and demands amongst older people.</li> </ul>
Indoor tennis	<ul style="list-style-type: none"> <li>The supply of indoor tennis provision in Sunderland offers sufficient capacity to accommodate additional members and users.</li> <li>The Silksworth site has spare capacity at peak and off peak times, which could be better utilised, although customers travel significant distances to use the facility and with c. 20 clubs, it is proving to be a popular venue.</li> <li>Silksworth is in good condition and appears to offer tennis to a different market than that offered by Wearside Health and Rackets Club.</li> <li>The investment and extension to the health and fitness offer may start to compete with the Wearside Club</li> </ul>

Facility type	Summary of key challenges and issues
	as the quality of the facility is significantly improved.

### *Unmet sports hall demand*

The proposed redevelopment of the Seaburn Centre site and its potential closure will lead to further demand for sports hall space for both clubs and events. Again, the audit identifies that this demand is unlikely to be met by the current stock of facilities. Monkwearmouth School sports hall is the closest facility but would need significant investment, increase its opening hours (not just term time) and consider moving all football outside (which it currently does not have the facilities to do) in order to alleviate some of that demand. It is unlikely that the school will be able to accommodate all of this displaced demand, given its own level of community use. It is, therefore, important for SCC to consider supporting the development of a single site venue.

In terms of assessing the merits of meeting unmet sports hall demand with a single site development, membership data from the city's leisure complexes identifies that despite low levels of car ownership in the city (34%), residents will and do travel to access good quality facilities. Despite low levels of car ownership Sunderland is a city with a good transport network, which is complimented by the Tyne and Wear Metro. By way of an example, the current accessibility of the Aquatic Centre, next to the Stadium of Light indicates that nearly one third of its membership live within the highest areas of deprivation, and that members travel from all over Sunderland to access the facilities. Despite their being a high number of people who do not have access to cars the Aquatic Centre appear to be able to draw in users from a wide area of the city. The current membership data for Seaburn indicates that two thirds of its membership is from people resident outside of Sunderland.

The national governing bodies (NGBs) of Badminton, Netball, Basketball and Fustsal indicate the need for a minimum of an 8 court hall (badminton and netball suggest that 12 courts is preferable) which will allow opportunities for both local, regional and (in some instances) national events to be hosted.



## SECTION 1: INTRODUCTION

### 1.1 Background

KKP was appointed by Sunderland City Council (SCC) to undertake an assessment of the formal indoor sports facility needs in the City in order that it may strategically plan for the future. The aim is to provide a detailed assessment of current provision of indoor and built sports facilities, identifying needs and gaps in provision.

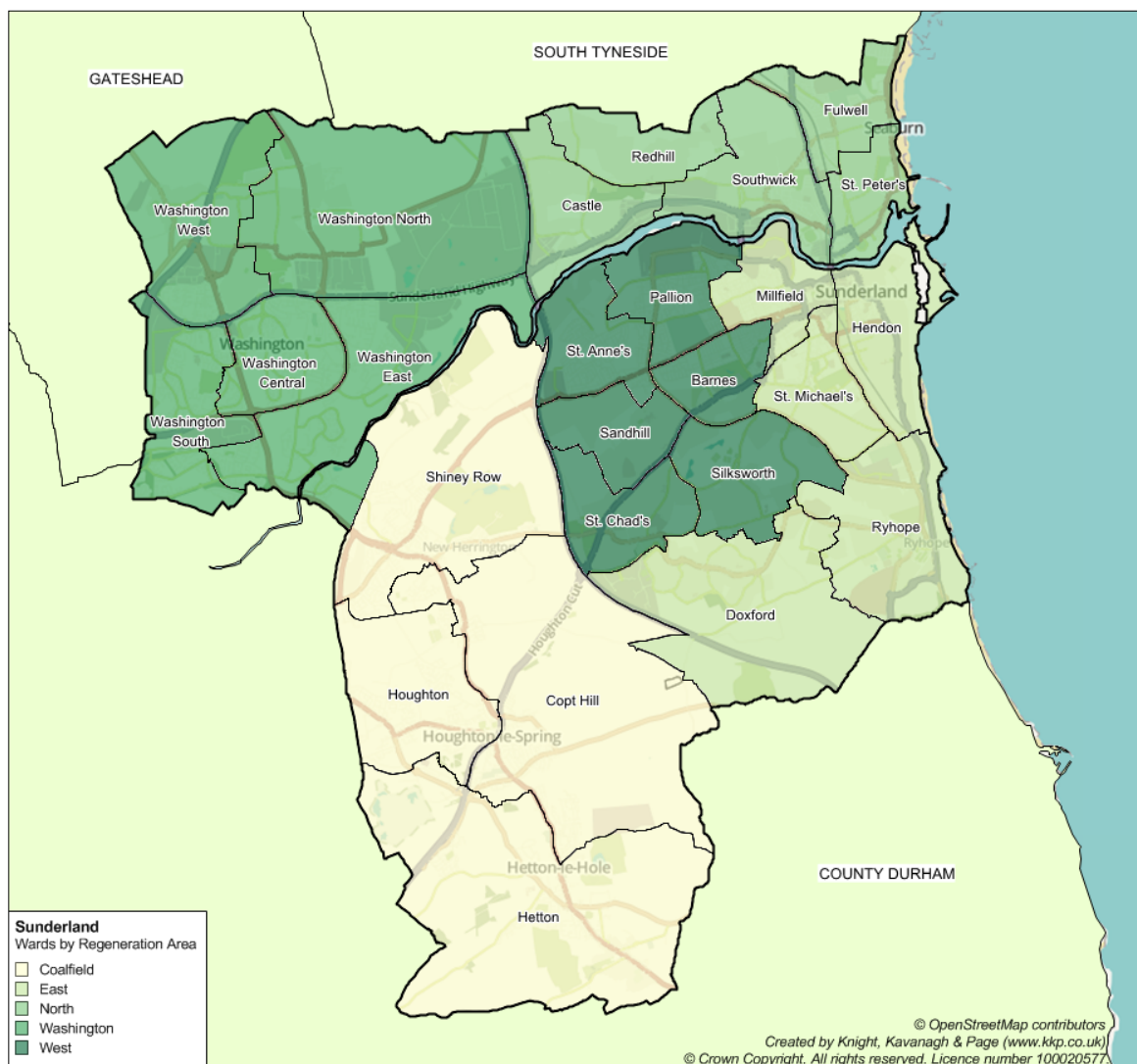
The City of Sunderland is a local government district of Tyne and Wear situated in the North East of England. It is bordered by the authorities of South Tyneside, Gateshead and County Durham. It is named after its largest settlement Sunderland but covers a far larger area which includes the towns of Hetton-le-Hole, Houghton-le-Spring, Washington and a range of suburban villages. The city had a population of 275,300 at the 2011 census; the majority of the population (174,286) reside in Sunderland itself.

*Figure 1.1: Sunderland City Council main towns and villages*



Sunderland has five distinct regeneration areas; Coalfields, Sunderland East, Sunderland North, Sunderland West and Washington. These are depicted in Figure 1.2

Figure 1.2: Map to show five regeneration areas in Sunderland



Area	Characteristics
<b>Coalfield</b> The Coalfield area covers 4,722 hectares (34% of the city) and is divided into four wards.	<p>There were estimated to be 47,800 residents in the Coalfield area in 2010, which represented 17% of the authority's population</p> <p>There are fewer people aged 65 and over and children aged under 16 than the average for SCC, but proportionately more adults aged 16–64 years. There are, proportionately speaking, a small, but growing, number of people from black and ethnic minorities resident in Coalfield.</p> <p>Overall, Hetton is the most deprived ward in the area, though there are areas of deprivation throughout the area and within other wards</p> <p>There are 21,500 household spaces in Coalfield. The average household size is 2.3 people. The level of owner-occupation was 67% in 2011, higher than the city average. The proportion of social housing (27%) is in line with the city average.</p>
<b>Sunderland East</b> East Sunderland covers 2,450 hectares (18% of the city) and is divided into five wards	<p>There were estimated to be 56,200 residents in East Sunderland in 2010; 20% of the Authority's population.</p> <p>There are fewer people aged 65 and over and children aged under 16 than the average for the authority, but proportionately more adults aged 16–64 years. There are a number of sub-wards in which there are small, but growing, populations of people from black and ethnic minorities in East Sunderland, most notably in Hendon.</p> <p>There are 25,740 household spaces in East Sunderland; average household size is 2.3 people. The level of owner-occupation (at 67% in</p>

Area	Characteristics
	2011) is higher than the city average and the proportion of social housing (at 20%) is lower and concentrated in specific areas.
<b>Sunderland North</b> The North Sunderland area covers 1,623 hectares (12% of the city) and is divided into five wards.	There were estimated to be 57,000 residents in North Sunderland in 2010; 20% of the Authority's population. There are more people aged 65 and over than the average for the authority, but proportionately fewer residents aged 0–64 years. There is a small, but growing, number of people from black and ethnic minorities in the area There are 25,460 household spaces in North Sunderland; average household size is 2.31 people. The level of owner-occupation was 66% in 2011, higher than the city average. The proportion of social housing (28%) is in line with the city average.
<b>Sunderland West</b> West Sunderland covers 1,825 hectares (13% of the city) and is divided into six wards	There were estimated to be 65,800 residents in West Sunderland in 2010; 23% of the Authority's population. More people aged 65+ than the average for the city live in the area, but proportionately fewer adults aged 16–64 years. In certain sub-wards there are small, but growing, populations of people from black and ethnic minorities There are 28,700 household spaces and average household size is 2.32 people. The level of owner-occupation was 66% in 2011, similar to the city average. The proportion of social housing (30%) is higher than the city average and concentrated in specific areas.
<b>Washington</b> The Washington area covers 3,345 hectares (24% of the city) and is divided into five wards.	There were estimated to be 56,975 residents in the Washington area in 2010; 20% of the Authority's population. There are fewer people aged 65 and over and children aged under 16 than the average for the authority, but proportionately more adults aged 16–64 years. There is a small, but growing black and ethnic minority community in Washington. There are 24,200 household spaces in Washington; average household size is 2.5 people. The level of owner-occupation was 68% in 2011, higher than the city average. The proportion of social housing (30%) is also higher than the city average (27%).

## 1.2 Scope of the project

The Assessment Report provides detail as to what exists in the City, its condition, location, availability and overall quality. It considers the demand for facilities based on population distribution, planned growth and also takes into consideration health and economic deprivation. The facilities / sports included are: sports halls, health and fitness, studios, squash, indoor bowls and indoor tennis. In delivering this report KKP has:

- ◀ Individually audited identified, sports halls (conventional i.e. 3+ court halls as per Sport England definitions), health and fitness facilities (including, within reason, dance studios) and squash courts (public, private and voluntary sector owned/managed).
- ◀ Analysed the supply and demand of facilities to identify gaps in provision and opportunities for improved provision.
- ◀ Sought to ensure that delivery of leisure facilities is undertaken with full reference to the corporate strategies of the Council and other relevant strategic influences.
- ◀ Identified areas of good practice, gaps in provision and opportunities for improved service in order to drive up participation levels.

This factual report provides a quantitative and qualitative audit based assessment of the facilities identified above. It provides a robust, up-to-date assessment of need for sports halls, health and fitness and specialist facilities and examines opportunities for new, enhanced and rationalised provision. Specific deficiencies and surpluses are identified to inform the provision required. The specific objectives of this audit and assessment are to:

- ◀ Identify local needs and quantify levels of demand
- ◀ Audit existing facility provision

The specific tasks addressed as part of this strategies development include:

- ◀ Review of relevant Council strategies, plans, reports, corporate objectives.
- ◀ Review of the local, regional and national strategic context.
- ◀ Analysis of the demographics of the local population.
- ◀ Consideration of potential participation rates and modelling of likely demand.
- ◀ Audit of indoor facilities provided by public, private, voluntary and education sectors.
- ◀ Supply and demand analysis.
- ◀ Analysis of the balance between supply of and demand for sports facilities and identification of potential under and over provision.
- ◀ Identification of key issues to address in the future provision of indoor sports facilities.

### 1.3 Report structure

The Royal Town Planning Institute (RTPI) in a new report entitled '*Strategic Planning: Effective Co-operation for Planning Across Boundaries (2015)*' puts the case for strategic planning based on six general principles:

- ◀ Have focus
- ◀ Be genuinely strategic
- ◀ Be spatial
- ◀ Be collaborative
- ◀ Have strong leadership and
- ◀ Be accountable to local electorates.

In preparation of this report, KKP has had regard to these strategic principles and the report is structured as follows:

- ◀ Section 2 - a review of background policy documentation at national, regional and local levels and a profile of the population and socio-demographic characteristics of the City.
- ◀ Section 3 – description of methodology employed to review indoor provision
- ◀ Section 4 - review of sports hall provision
- ◀ Section 5 - review of health, fitness and studio provision
- ◀ Section 6:- analysis of membership data
- ◀ Section 7 - review of squash court provision
- ◀ Section 8 - review of indoor bowls provision
- ◀ Section 9 - review of indoor tennis provision
- ◀ Section 10 – identification of strengths, weaknesses, opportunities and threats, followed by strategic recommendations.

## SECTION 2: BACKGROUND

### 2.1 National Context

Sport England aims to ensure positive planning for sport, enabling the right facilities to be provided in the right places, based on up to date assessment of need for all levels of sport and all sectors of the community. This draft assessment report has been produced for Sunderland City Council using the principles and tools identified in the Sport England guide 'Assessing Needs and Opportunities for Indoor and Outdoor Sports Facilities' (ANOG).

Figure 2.1: ANOG model



As illustrated, Sport England regards an assessment of need as core to the planning for sporting provision. This assessment report reviews indoor and built sporting facility needs in Sunderland and provides a basis for future strategic planning.

### ***Sport England: A Sporting Habit for Life (2012-2017)***

In 2017, five years after the Olympic Games, Sport England aspires to transform sport in England so that it is a habit for life for more people and a regular choice for the majority. The strategy will:

- ◀ See more people starting and keeping a sporting habit for life.
- ◀ Create more opportunities for young people.
- ◀ Nurture and develop talent.
- ◀ Provide the right facilities in the right places.
- ◀ Support local authorities and unlock local funding.
- ◀ Ensure real opportunities for communities.

The vision is for England to be a world leading sporting nation where many more people choose to play sport. There are five strategic themes including:

- ◀ Maximise value from current national governing body of sport (NGB) investment.
- ◀ Places, People, Play.
- ◀ Strategic direction and market intelligence.
- ◀ Set criteria and support system for national; governing body of sport (NGB) 2013-17 investment.
- ◀ Market development.



## ***National Planning Policy Framework 2012***

The National Planning Policy Framework (NPPF) sets out planning policies for England. It details how these changes are expected to be applied to the planning system. It also provides a framework for local people and their councils to produce distinct local and neighbourhood plans, reflecting the needs and priorities of local communities. It states that the purpose of the planning system is to contribute to the achievement of sustainable development. It identifies the need to focus on three themes of sustainable development:

- ◀ Economic
- ◀ Social
- ◀ Environmental

A presumption in favour of sustainable development is a key aspect for any plan-making and decision-taking processes. In relation to plan-making the NPPF sets out that local plans should meet objectively assessed needs. It is clear about the sport's role delivering sustainable communities through promoting health and well-being. Sport England, working within the provisions of the NPPF, wishes to see local planning policy protect, enhance and provide for sports facilities based on robust and up-to-date assessments of need, as well as helping to realise the wider benefits that participation in sport can bring.

The 'promoting healthy communities' theme identifies that planning policies should be based on robust, up-to-date assessments of need for open space, sports and recreation facilities and opportunities for new provision. Specific needs and quantitative and qualitative deficiencies and surpluses in local areas should also be identified. This information should be used to inform what provision is required in an area.

### ***Economic value of sport to the nation***

Sport, leisure, recreation and culture are all important economic drivers. In 2010, sport and sport-related activity contributed £20.3 billion to the English economy – 1.9% of the England total. The contribution to employment is even greater – sport and sport-related activity is estimated to support over 400,000 full-time equivalent jobs, 2.3% of all jobs in England.

Volunteering in sport, and the health benefits derived, also have an impact on the economy. The estimated economic value of sport-related volunteering is £2.7 billion. The annual value of health benefits from people taking part in sport is estimated at £11.2 billion.

The benefits of sport include the well-being/happiness of individuals taking part, improved health and education, reduced youth crime, environmental benefits, regeneration and community development, and benefits to the individual and wider society through volunteering. Consumption of sport benefits include the well-being/ happiness of spectators, and the national pride/feel good factor derived from sporting success/achievement.

Participation in sport can contribute to reductions in crime and anti-social behaviour, particularly amongst young people. It can also have a net impact on the environment; where, for example, more people are encouraged to walk and cycle, emissions and congestion can reduce although there is an argument to suggest that this would be counterbalanced by the impact of those attending sports events.

In summary, sport and physical activity provides a range of economic and health benefits to the North East region, Sunderland and its local resident population and helps to provide jobs and opportunities to spectate and participate in sport and physical activity.





## ***Public Health England: Everybody Active, Everyday***

In October 2014 Public Health England (PHE) produced its plan to tackle low activity levels across the country. Along with making the case for physical activity, this identifies four areas where measures need to be taken at a national and local level:

- ◀ Active society: creating a social movement, shifting social norms so that physical activity becomes a routine part of daily life.
- ◀ Moving professionals: activating networks of expertise. Making every contact with the health sector count to push the 'active' message and to deliver the message through other sectors including education, sports and leisure, transport and planning.
- ◀ Active environments: creating the right spaces. Making available and accessible appropriate environments that encourage people to be active every day.
- ◀ Moving at scale: scaling up interventions that make us active. Maximising existing assets that enable communities to be active.

## ***Investment in school sport***

In March 2013 the Government announced funding for school sport (Sport Premium) which sees £150 million per annum invested over the next two years. This comprises funding from various Government departments including Department for Education (£80m), the Department of Health (£60m) and the Department for Culture, Media and Sport (£10m). The Government's strategy is to put funds directly into the hands of primary school head teachers for them to spend on sport.

Schools are measured by Ofsted on how well they use their Sport Premium to improve the quality and breadth of PE and sporting provision, including increasing participation in PE and sport so that all pupils develop healthy lifestyles and reach the performances levels of which they are capable.

## ***Priority School Building Programme (PSBP)***

The PSBP is a centrally managed programme set up to address the needs of the schools most in need of urgent repair. Through the programme 261 schools will be re-built between 2014 and 2017.

## ***Summary of national context***

Engaging all residents in physically activity is a high priority for national and local government. For many residents sport and recreational activities have a key role to play in facilitating physical activity. Ensuring adequate supply of suitable facilities to meet local need is a requirement of the planning system. In line with national policy recommendations this report makes an assessment of indoor facility provision and need across Sunderland.

## 2.2 Local context

### ***Sunderland Corporate Outcomes Framework***

This identifies the vision is for Sunderland to be a smart, sustainable city synonymous with the North East with a high performing and admired council. Its purpose is to ensure Sunderland is a place where people can fulfil their ambitions and potential. There are three key themes of People, Places and Economy and each has a number of corporate outcomes identified in Table 2.1.

*Table 2.1: Sunderland's corporate outcomes*

Key theme	Corporate outcomes
<b>People</b>	<ul style="list-style-type: none"><li>◀ A city where everyone is as healthy as they can be and enjoys a good standard of wellbeing</li><li>◀ A city with high levels of skills, educational attainment and participation</li><li>◀ A city which is, and feels, even safer and more secure</li><li>◀ A city that ensures people are able to look after themselves wherever possible</li></ul>
<b>Places</b>	<ul style="list-style-type: none"><li>◀ An attractive, modern city where people choose to invest, live, work and spend their leisure time</li><li>◀ A responsible, well looked-after city that is adaptable to change</li><li>◀ A well connected city</li><li>◀ A city where cultural identity and vibrancy act as a significant attraction</li></ul>
<b>Economy</b>	<ul style="list-style-type: none"><li>◀ A new kind of University City</li><li>◀ A national hub of the low carbon economy</li><li>◀ A prosperous and well connected waterfront city centre</li><li>◀ An inclusive city economy</li></ul>

### ***A City Approach to an Active Sunderland***

A policy position was adopted by Cabinet in November 2014 acknowledging that the challenge now facing the Council and the city, is to enhance the conditions and opportunities for more people to become more active more often. By adopting a strategic, joined up approach to improving levels of activity, this will enable the city to maximise the impact that physical activity has in Sunderland. Specifically, the approach is:

- ◀ To impact on the greatest number of people (children and adults)
- ◀ To enable children and young people to have the best start in life and form good habits
- ◀ To support people in families and communities that are benefiting least from the opportunities that being active brings and which is where the greatest gains in outcomes are to be made
- ◀ To provide access to all our infrastructure, green and blue space as well as sport and leisure facilities, including pathways to sporting excellence.

Moreover, this approach will provide:

- ◀ A clear direction and identify a new joined up approach to an Active Sunderland
- ◀ Shared priority outcomes for the people of Sunderland

It is anticipated that this approach will create an ***All together an Active Sunderland - a city where everyone is as active as they can be is at the heart of the approach.***

Creating, enabling and providing opportunities for people to be active and more active will be supported and underpinned by the work of key stakeholders in the city. In achieving the approach, the following themes will be supported by positive messaging and promotion.

- ◀ *Empowering communities* - supporting and enabling communities to look at informal opportunities to be active and increasing support to the community and voluntary sector, so that they can help to grow the numbers of residents being active.
- ◀ *Active environments* - make it easier for people to be active through their everyday activities and the environment (i.e. green space, open space).
- ◀ *Sport and leisure facilities* – ensuring swimming pools, sports halls and wellness centres complement the needs of residents.
- ◀ *Working with schools* – ensuring students and families are provided with a positive experience and the best opportunities within and beyond the curriculum.
- ◀ *Workforces and workplaces* – ensuring the environments and policies are in place to enable the workforce to be active.
- ◀ *Understand need and evaluate impact* - ensure opportunities are in place due to need and evidence of impact.
- ◀ *Supporting individuals* - opportunities are in place for those who may need more assistance in accessing good quality opportunities to be active.

### ***Joint Health & Wellbeing Strategy (JHWS) for Sunderland***

The JHWS sets out the vision for improving the health and wellbeing of local people with a view to having the best possible health and well-being for Sunderland. By this it means a city where everyone is as healthy as they can be, people live longer, enjoy a good standard of wellbeing and we see a reduction in health inequalities.

The strategy is informed by the need to forge a new way of working for the benefit of Sunderland and brings together the Health and Wellbeing Strategy, Community Resilience Plan and Strengthening Families. A new set of design principles for the strategy have been agreed which include:

- ◀ Strengthening community assets.
- ◀ Prevention.
- ◀ Equity – providing access to excellent services dependent on need and preferences that are also based on evaluated models and quality standards.
- ◀ Promoting independence and self-care – enabling individuals to make effective choices for themselves and their families.
- ◀ Joint working – shaping and managing cost effective interventions through integrated services.
- ◀ Addressing factors that have a wider impact on health – education, housing, employment, environment; doing so proportionately across the social gradient.
- ◀ Life course – ensuring appropriate action throughout an individual's life with a focus on early years and families.

The following Strategic Objectives describe how Sunderland will achieve its vision for health and wellbeing. Detailed action plans are being developed for each. Each strategic objective utilises one or more of the assets and applies all of the design principles.

- ◀ Promoting understanding between communities and organisations
- ◀ Ensuring that children and young people have the best start in life
- ◀ Supporting and motivating everyone to take responsibility for their health and that of others
- ◀ Supporting everyone to contribute understanding the health barriers to employment and training, and supporting people to overcome them.
- ◀ Supporting individuals and their families to recover from ill-health and crisis

### ***Tyne and Wear Sport***

Tyne & Wear Sport (TWS) is one of 45 county sports partnerships (CSPs) located across England and as such receives funding from Sport England to carry out a number of core functions to support NGBs to successfully implement their whole sport plans. In this capacity its strategic remit is to:

- ◀ Interpret and shape national, regional and local policy to best fit community needs and coordinate delivery in the sub-region.
- ◀ Facilitate strategic networking including connecting NGBs to the local area and local partners.
- ◀ Co-ordinate and promote club, coach and volunteer development
- ◀ Broker effective partnerships between NGBs and organisations working with children and young people
- ◀ Promote potential Sport England national lottery funding applications as well as other relevant funding opportunities and provide funding advice to NGBs on request.
- ◀ Support partners through use of knowledge and information management.

TWS is a charitable company limited by guarantee, incorporated in March 2010. It has a number of charitable objectives which are designed to benefit the inhabitants of the partnership area which include:

- ◀ To promote the health of individuals and communities through increased community participation in sport, active recreation and physical fitness
- ◀ To advance and further the education of the public in relation to physical fitness, nutrition, active recreation and lifestyle
- ◀ To provide or assist in providing facilities in the interests of social welfare for recreation, physical education or other leisure time occupation.

It works via a range of programmes including Sportivate, Satellite Clubs, School Games, Primary Premium and Active Workplaces. It has developed a tiered system of working with sports which is shown in Table 2.2.

Table 2.2: Tyne and Wear Sport rationale for working with NGBs

Tier and description	Sports included
<b>Tier 1 NGBs</b> – Established relationship with NGB, priorities confirmed, action plan in place to support delivery of WSP outcomes. TWS works closely with NGB and the sport giving priority to them based on latent demand, popularity in the sub-region, identified by NGB geographically within NPS and the potential impact development could have on APS results	Athletics, Badminton, Cricket, Football, Golf, Netball, Rugby Union, Swimming, Tennis, Triathlon , Volleyball
<b>Tier 2 NGBs</b> – NGB is engaged and frequently uses TWS core & coaching services. The NGB is proactive and the sport is seen as a priority for the CSP area. TWS taking the lead based on significant local demand.	Angling, Archery , Basketball , Boxing, Canoeing, Cycling, Fencing , Gymnastics, Judo, Rowing, Sailing, Snow Sport, Weight Lifting
<b>Tier 3 NGBs</b> Not a priority area for NGB but all TWS core & coaching services are available if required.	Baseball/Softball, Boccia, Bowls, Dance, Equestrian, Goalball, Handball, Hockey, Lacrosse, Modern Pentathlon, Mountaineering, Orienteering, Rounders, Rugby League, Shooting, Squash, Table Tennis, Taekwondo, , Water Skiing, Wheelchair Basketball, Wheelchair Rugby, Wrestling

### ***The Seaburn Masterplan (2011)***

In addition to the above, Sunderland has been undergoing significant regeneration and one of the key strategies moving forward will be The Seaburn Masterplan. Its vision is for the area to *'build on its unique natural environment and rich heritage, the seafront at Seaburn. It will be an attractive, safe, clean and accessible destination for all residents and visitors, of which the people of Sunderland can be proud. Seaburn will be a family focused resort offering high quality indoor and outdoor facilities. It will be a welcoming place to enjoy all year round, providing activities and events for everyone, supporting Sunderland's aspiration to be the UK's most liveable city.'*

The objectives of the master plan are to:

- ✦ Maximise the impact and improve the economic vibrancy of the area.
- ✦ Provide high quality public amenities and facilities.
- ✦ Create a family friendly environment which is safe and clean.
- ✦ Offer high quality and affordable activities and events throughout the year.
- ✦ Create an attractive and high quality environment where both residents and visitors can relax.
- ✦ Create an area which is physically and intellectually accessible.
- ✦ Deliver a truly sustainable development capable of being displayed as an example of best practice.

Much work has already been undertaken with respect to Seaburn regeneration with further activity planned within the next five years. This may lead to closure of the Seaburn Centre as the whole area is transformed into a different type of leisure destination. At present, however, the Seaburn Centre continues to operate as a local leisure centre serving the surrounding residential area. The facilities it provides such as the Wellness Centre and sports hall are of value to the local community. It should therefore be ensured that appropriate sport and leisure provision is available for existing users in the context of the Seaburn masterplan and/or the wider local area.

## ***Foundation of Light***

The Foundation of Light is a charitable organisation working throughout Sunderland and beyond. It aims to utilise the power of the Sunderland AFC brand to engage, in particular, hard to reach groups to make a difference. It is structurally and financially independent of the football club, which means it has to fundraise to exist. Its vision is a community where everyone has choice and the opportunity to improve lives and its mission is *to Involve, Educate and Inspire through the power of football*. Its five stated aims are to:

- ◀ Raise educational attainment; inspire a love and commitment to lifelong learning.
- ◀ Increase skills and access to employment opportunities by connecting people to the world of work.
- ◀ Enable individuals and families to develop healthier and happier lives; support the development of vibrant and respectful communities.
- ◀ Provide more opportunities for inclusive sport and play, inspiring participation and achievement.
- ◀ Deliver high standards through a committed highly skilled workforce and excellent leadership and governance.

The Foundation of Light has applied to develop what is entitled as a Centre for Opportunities. Key to this delivery is the development of a 12 court sports hall and ancillary facilities.

## ***Summary of local context***

The core message running through local strategies is the requirement to ensure that:

- ◀ Opportunities are made available to/for all Sunderland residents to take part in physical activity to contribute positively to the health and wellbeing of all residents.
- ◀ There will be increasing pressure on finances and resources within SCC as local government finance is put under further pressure (especially non statutory services).
- ◀ SCC works with partners to ensure that facilities and infrastructure are provided to support sustainable communities in Sunderland.
- ◀ There are good facilities and programmes which contribute to the education and skills development of the local population.
- ◀ Facilities and programmes of activity will continue to contribute to reducing health inequalities across the City for all age groups.

This will only be achieved via targeting increasingly scarce resources. It is, thus, essential that indoor sports halls and health and fitness venues are accessible and available to the community and that the 'offer' is developed based on the needs of local communities.

## 2.3 Demographic profile

The following is a brief summary, based on KKP's area profile for the City (see Appendix 1 for full detail). It is based on data taken from nationally recognised sources such as the Office for National Statistics (ONS), NOMIS, Sport England and Experian.

### *Population and distribution*

The total population, from the 2013 MYE, in Sunderland was 276,080 (males = 134,377 and females = 141,703). The population age bands in Sunderland closely match those for the North East region.

### *Ethnicity*

In broad terms, Sunderland's ethnic composition varies from much of England as a whole. According to the 2011 Census of population, the largest proportion (95.9%) of the local population classified their ethnicity as White; this is much higher than the comparative England rate of 85.4%. The next largest population group (by self-classification) is Asian, at 2.7% this is markedly lower than the national equivalent (7.8%).

### *Economic activity and inactivity*

Slightly fewer residents age 16-64 of SCC are economically active (in or seeking employment – Dec 2014) at 7 in 10 (71.2%) compared to a national figure of 77.3%. The unemployment rate<sup>1</sup> in Sunderland is 9.0%, which is above the North East figure (8.5%) and significantly higher than the national rate (6.2%). 28.8% of SCC's 16-64 year olds are economically inactive, of these around 1 in 5 are students and 1 in 3 are long term sick.

### *Income and benefits dependency*

The median figure for full-time earnings (2014) in Sunderland is £23,738; the comparative rate for the North East is £24,809 (+4.5%) and for Great Britain is £27,082 (+14.1%). As of May 2015 there were 5,497 people in Sunderland claiming Job Seekers Allowance (JSA); this represents a decrease of 11.5% when compared to May 2006 (-718). However, in May 2014, people claiming JSA only represent 16.6% of benefits claimants in Sunderland, a further 51.3% claim ESA<sup>2</sup> and incapacity benefits while 12.7% are carers.

### *Deprivation*

Relative to other parts of the country Sunderland experiences high levels of deprivation; over half of the City's population (52.5%) falls within the areas covered by the country's three most deprived cohorts compared to a national average (30%). Conversely, 9.8% live in the three least deprived groupings in the country, compared to the 'norm' of 30%.

A similar pattern, to that seen for multiple-deprivation, is seen in relation to health – yet more so. Almost three quarters of Sunderland's population (73.1%) falls within the areas covered by the three most deprived cohorts (national average:30%). Conversely, none live in the three least deprived groupings ('norm':30%).

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<sup>1</sup> Note the unemployment rate is modelled by the Office for National Statistics

<sup>2</sup> Employment and Support Allowance is directly targeted to support those who are ill or disabled.



Figure 2.2: Index of multiple deprivation

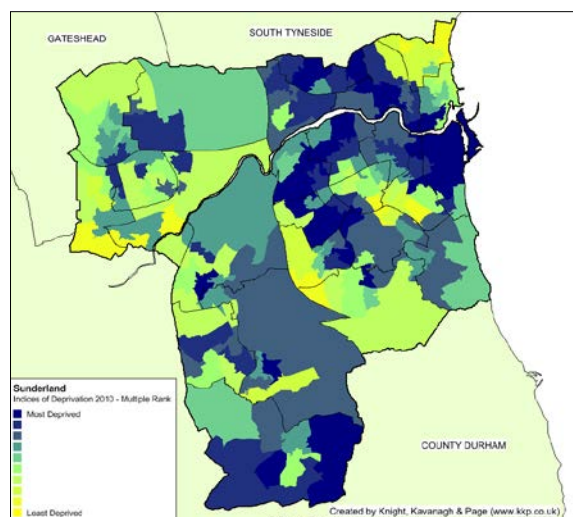
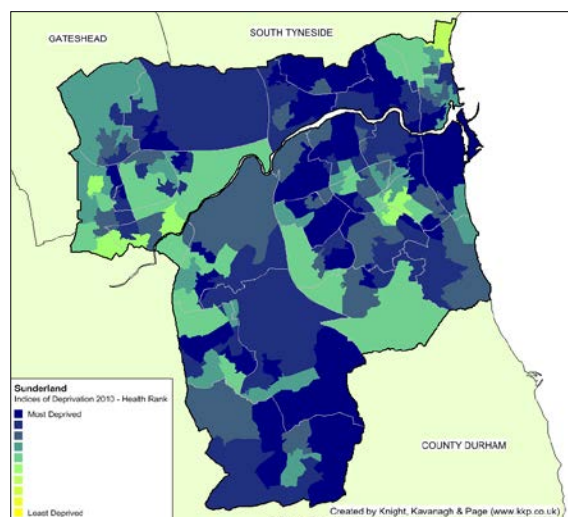


Figure 2.3: IMD Health domain



### Health costs of physical inactivity

The British Heart Foundation (BHF) Promotion Research Group has reviewed the costs of avoidable ill health that it considers are attributable to physical inactivity. Initially produced for the DoH report Be Active Be Healthy (2009) the data has subsequently been reworked for Sport England.

#### Health data

(Data sources: ONS births and deaths, NCMP<sup>3</sup> and NOO<sup>4</sup>)

In 2013 there were 3,009 live births in Sunderland; there were also 2,939 deaths; consequently there were 70 more births than deaths in 2013. In keeping with patterns seen alongside higher levels of health deprivation, life expectancy in Sunderland is lower than the national figure; the male rate is currently 77.3 compared to 79.4 for England, and the female equivalent is 80.9 compared to 83.1 nationally.<sup>5</sup>

### Health costs of physical inactivity

The British Heart Foundation (BHF) Promotion Research Group has reviewed the costs of avoidable ill health that it attributes to physical inactivity. Initially produced for the DoH report Be Active Be Healthy (2009) the data has subsequently been reworked for Sport England. Illnesses, that the BHF research relates to, include cancers such as bowel cancer, breast cancer, type 2 diabetes, coronary heart disease and cerebrovascular disease e.g. stroke. The data indicates a similar breakdown between these illnesses regionally and nationally.

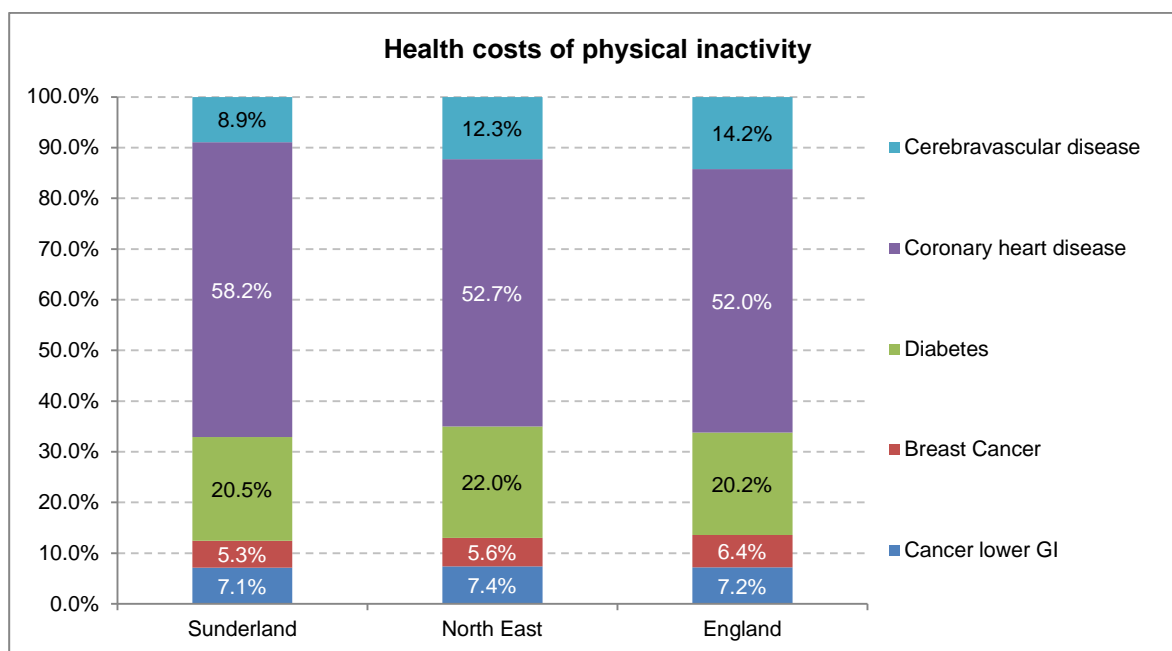
<sup>3</sup> National Child Measurement Program

<sup>4</sup> National Obesity Observatory

<sup>5</sup> Office of National Statistics: Life Expectancy at Birth by local areas in the United Kingdom, 2013.



Figure 2.4: Health costs of physical inactivity



The annual cost to the NHS of physical inactivity in Sunderland is estimated at £6,522,580.

When compared to regional and national costs per 100,000, Sunderland (£2,384,649) is 31.2% above the national average (£1,817,285) and 18.2% above the regional average (£2,016,905).

It should also be noted that in addition to the NHS costs there are also significant costs to industry in terms of days of productivity lost due to back pain etc. These have also been costed in CBI reports and are of similar magnitude to NHS costs.

#### Active People Survey

Sport England's Active People Survey 8 (APS 8) produced the following key findings for Sunderland:

- Participation - just over a third (34.7%) of adults participated in at least 1 x 30 minutes moderate intensity sport per week. This was below the national average (35.8%) but slightly above the regional average (33.9%). It was above all but one of its 'nearest neighbours' which ranged from 30.5% to 39.1%. ('Nearest neighbours' are those local authorities identified as similar in economy and demographics according to CIPFA).
- Sports club membership - just over 1 in 5 (21.2%) are members of a sports club, based on the four weeks prior to the AP survey. This is comparable with the national average (21.6%) and slightly above the regional rate (18.8%); it is below two of its 'nearest neighbours'.
- Sports tuition - just over 1 in 8 (12.9%) received sports tuition during the 12 months prior to the AP survey. This was below regional and national averages and two of its 'nearest neighbours'.

Active People and SE segmentation make it possible to identify the top five sports in any area; within Sunderland the five most popular activities are swimming, gym football, cycling and fitness and conditioning.

Table 2.3: Most popular sports comparing Sunderland, North East and England

Sport	Sunderland		North East		England	
	No. (000s)	Rate	No. (000s)	Rate	No. (000s)	Rate
Swimming	31.4	13.2%	251.7	10.4%	4,622.7	10.9%
Gym	29.9	12.6%	240.1	6.5%	2,854.7	6.7%
Football	18.4	7.7%	175.8	11.1%	4,896.9	11.5%
Cycling	13.5	5.7%	152.2	7.8%	3,458.9	8.1%
Fitness & Conditioning	11.1	4.7%	147.8	6.2%	2778.8	6.5%

Source: APS8

Table 2.3 indicates that swimming and going to the gym are more popular in Sunderland than both national and regional averages. Football, cycling and fitness and conditioning, however, appear to be less popular than the equivalent regional and national averages.

It should be noted that whilst the APS is an indicator of participation and physical activity the authority wide figures are based on a small sample size (500 residents outside of London and 1000 residents for London boroughs).

### *Market Segmentation Model*

Sport England's market segmentation provides an insight into individual sporting behaviours. Nineteen different segments have been identified and each is given a pen name and a brief description (see Appendix 2). Knowing the most dominant segments can help direct provision and programming. For example, whilst the needs of smaller segments should not be ignored, it is useful to know which sports are enjoyed by the largest group. Segmentation also enables tailored interventions, good communication with target markets and a better understanding of participation in the context of life stage and life cycles.

Figure 2.5 below indicates the market segments in Sunderland in comparison with the rest of England. The data indicates that Elsie & Arnold, Kev and Brenda are the three dominant groups, representing 31.2% (69,352) of the adult population, compared to 18.8% nationally. The three market segments with the fewest people living in Sunderland are Helena 3,926 (1.76%), Chloe 3,166 (1.42%) and Ralph and Phyllis 2,502 (1.12%) which combined represent 4.3% of the adult resident population of the City.

Figure 2.5: SE segmentation comparing Sunderland with England

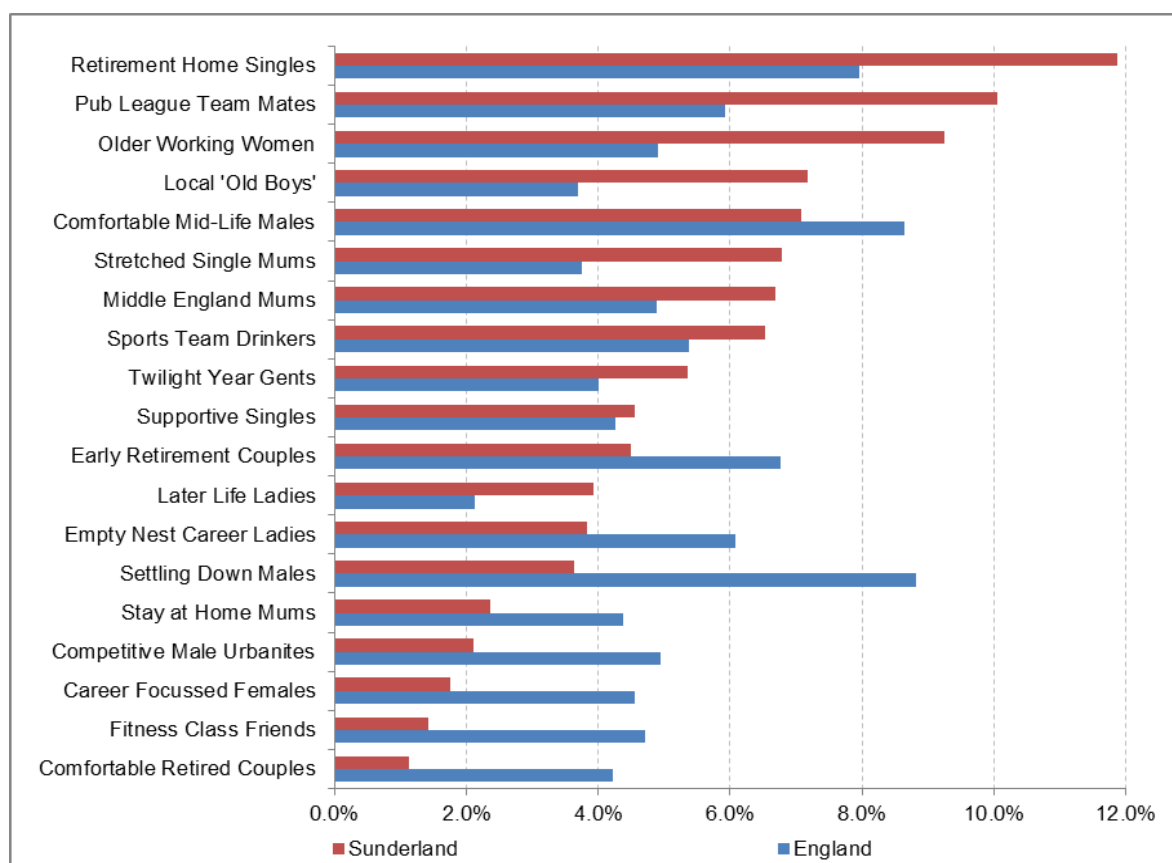
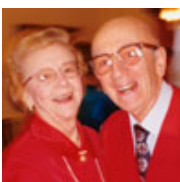




Table 2.4 (overleaf) indicates that two of its three most numerically dominant segments; Brenda and Elsie and Arnold are less active than the average adult. Their top sports are unlikely to put much strain on sports halls, tennis facilities or squash courts. It is estimated that 3% of the Elsie and Arnold segment will play bowls. All three segments identify that keep fit and going to the gym are important so this may impact on the use of health and fitness facilities. Conversely 'Kev's can be a significant proportion of the market for indoor sports venues.



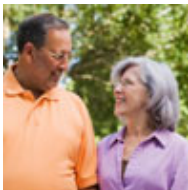
Table 2.4 Three most dominant segment types in Sunderland

Segment	Segment description	Segment sporting behaviours
 <b>Elsie &amp; Arnold</b> Retirement Home Singles	Retired singles or widowers, predominantly female, living in sheltered accommodation. <i>Retired, widowed.</i>	Main Age Band: 66+ Elsie and Arnold are much less active than the average adult. Their top sports are keep fit/ gym (10%), swimming (7%), bowls (3%), golf (1%) and cycling (1%).
 <b>Kev:</b> Pub League Team Mates	Blokes who enjoy pub league games and watching live sport. <i>Vocational job, may have children, married or single.</i>	Main Age Band: 36-45 Kev has above average levels of participation in sport. Kev's top sports are keep fit/ gym (14%), football (12%), cycling (11%), swimming (10%) and athletics including running (6%)
 <b>Brenda:</b> Older Working Women	Middle aged ladies, working to make ends meet <i>Part-time job, married.</i>	Main Age Band: 46-55 Brenda is generally less active than the average adult. Brenda's top sports are keep fit/ gym (15%), swimming (13%), cycling(4%), athletics including

Segment	Segment description	Segment sporting behaviours
		running (2%) and badminton (1%).

Table 2.5 indicates the three market segments with the fewest people living in Sunderland. Typically they would put more pressure on health and fitness facilities, swimming facilities and, in the case of Ralph and Phyllis, bowls, but the low numbers suggest otherwise.

*Table 2.5: Three smallest segment types in Sunderland*

Segment	Segment description	Segment sporting behaviours
 <b>Helena</b> Career Focused Female	Single professional women, enjoying life in the fast lane <i>Full time professional, single.</i>	Helena is a fairly active type that takes part in sport on a regular basis. Helena's top sports are keep fit/ gym (26%), swimming (22%), cycling (11%), athletics including running (9%), and equestrian (3%).
 <b>Chloe:</b> Fitness Class Friends	Young image-conscious females keeping fit and trim. <i>Graduate professional, single.</i>	Main Age Band: 18-25 Chloe is an active type that takes part in sport on a regular basis. Chloe's top sports are keep fit/ gym (28%), swimming (24%), athletics including running (14%), cycling (11%) and equestrian (5%)
 <b>Ralph &amp; Phyllis:</b> Comfortable Retired Couples	Retired couples, enjoying active and comfortable lifestyles. <i>Retired, married or single.</i>	Main Age Band: 66+ Ralph and Phyllis are less active than the average adult, but sportier than other segments of the same age group. Ralph and Phyllis' top sports are keep fit/ gym (10%), swimming (9%), golf (7%), bowls (4%), and cycling (4%).

### *Projected population: Long term change from 2012 to 2037*

At strategic and operational levels plans to increase levels of physical activity must not be set in stone, they should be flexible and respond to predicted changes in age structure, gender and ethnic composition. The most recent ONS projections indicate a rise of 1.7% in Sunderland's population (+4,710) over the 25 years from 2012 to 2037. Compared to many other parts of the country this is not considered to be significant

Over this extended timeframe fluctuations are seen in rise and fall at different points across the majority of age groups with population change acting more like a wave than a straight line (see figure 15). For example the number of 16-24 year olds falls by c.16% between 2012 and 2023 before rising again to -10.0% less than its 2012 baseline by 2037.

Population projections are based on straightforward process but can illustrate a relatively complex picture of change. Several key points are outlined below:

- ◀ There is a small but progressive rise in the number of 0-15 year olds, rising by +1,005 (+2.1%) over the first half of the projection (to 2024). This may place some additional pressure on differing types of sporting, educational and cultural provision (facility and services) by age, gender and sub-groups of the cohort.
- ◀ By contrast, there is predicted to be decline in the number of 16-24 year olds, -16.3% in the first period (-5,556) followed by growth back to -10.0% (-3,415) in the second period. Consequently Sport England's target of '*increasing the number of 14-25 year olds playing sport once a week*' may prove difficult during the first period in which numerical stasis would represent a marginal increase in participation rates.
- ◀ There is a continuous increase in the numbers of persons aged 65+ and a need to consider varying sports offers for this age group. This represents an increase of +26.2% (+12,753) in the first period continuing to rise to +52.4% (+25,562) between 2012 and 2037. While the age group represented 17.7% of Sunderland's population in 2012 it is projected to be 26.5% of the total by 2037 (over a quarter of the population).

### *Sunderland anticipated areas of local housing growth*

The Council is currently preparing a new Local Plan (2015-235) that will guide all development over the next 20 years. It has two parts:

- ◀ A *Core Strategy* which sets out the broad strategic policies and development principles for the City to 2032
- ◀ A separate *Allocations Plan* that will provide site specific detail. This will take its lead from the policies in the Core Strategy and work on this is likely to start in early 2014.

It is accompanied by three key supporting documents:

- ◀ The **Sustainability Appraisal** – this assesses the potential impact of the plan against a range of social, economic and environmental indicators;
- ◀ An '**Appropriate Assessment**' – this considers the potential impact of the plan on key international natural sites and habitats in Sunderland;
- ◀ The **Infrastructure Delivery Plan** - which demonstrates what infrastructure is required to support planned development, how much will it cost, where the money will come from and who will be responsible for its delivery

Over 15,000 new homes are planned over the next 20 years the distribution of which is outlined in Table 2.6.

*Table 2.6: Proposed distribution of housing development in Sunderland*

	2015/16-2019/20	2020/21–2024/25	2025/26-2029/30	Total dwellings
	Years1-5	Years 6-10	Years 11-15	Years 1-15
<b>North-Sunderland</b>	991	573	123	1,687
<b>Central Area</b>	455	1262	37	1,754
<b>South-Sunderland</b>	2,540	2880	1620	7,040
<b>Washington</b>	846	178	0	1,024
<b>Coalfield</b>	2,095	1394	260	3,749
<b>City</b>	<b>6,927</b>	<b>6,287</b>	<b>2,040</b>	<b>15,254</b>

The Built Leisure Strategic Needs Assessment will help inform the provision of built leisure and sports development in the Local Plan, including the allocation of suitable sites, and the development of related planning policies.

#### *Projection implications*

The projected increase in the general age of the population in Sunderland (with 65+ expected to increase to over a quarter of the population by 2024) will place increasing pressure on a range of services in Sunderland. The importance of ensuring that this cohort gets more active (with a view to sustaining and improving the general health of the local population) will become increasingly relevant. It will, therefore, be incumbent on operational staff to ensure that facility programming and access to facilities at the right times is considered as part of the City's sport and physical activity offer.

The largest number of proposed new housing is in South Sunderland. Consideration will need to be given, via programming and management arrangements, to ensure that any local increase in population will be catered for within the current level of sporting infrastructure available and whether there will be a local requirement for more or improved quality.

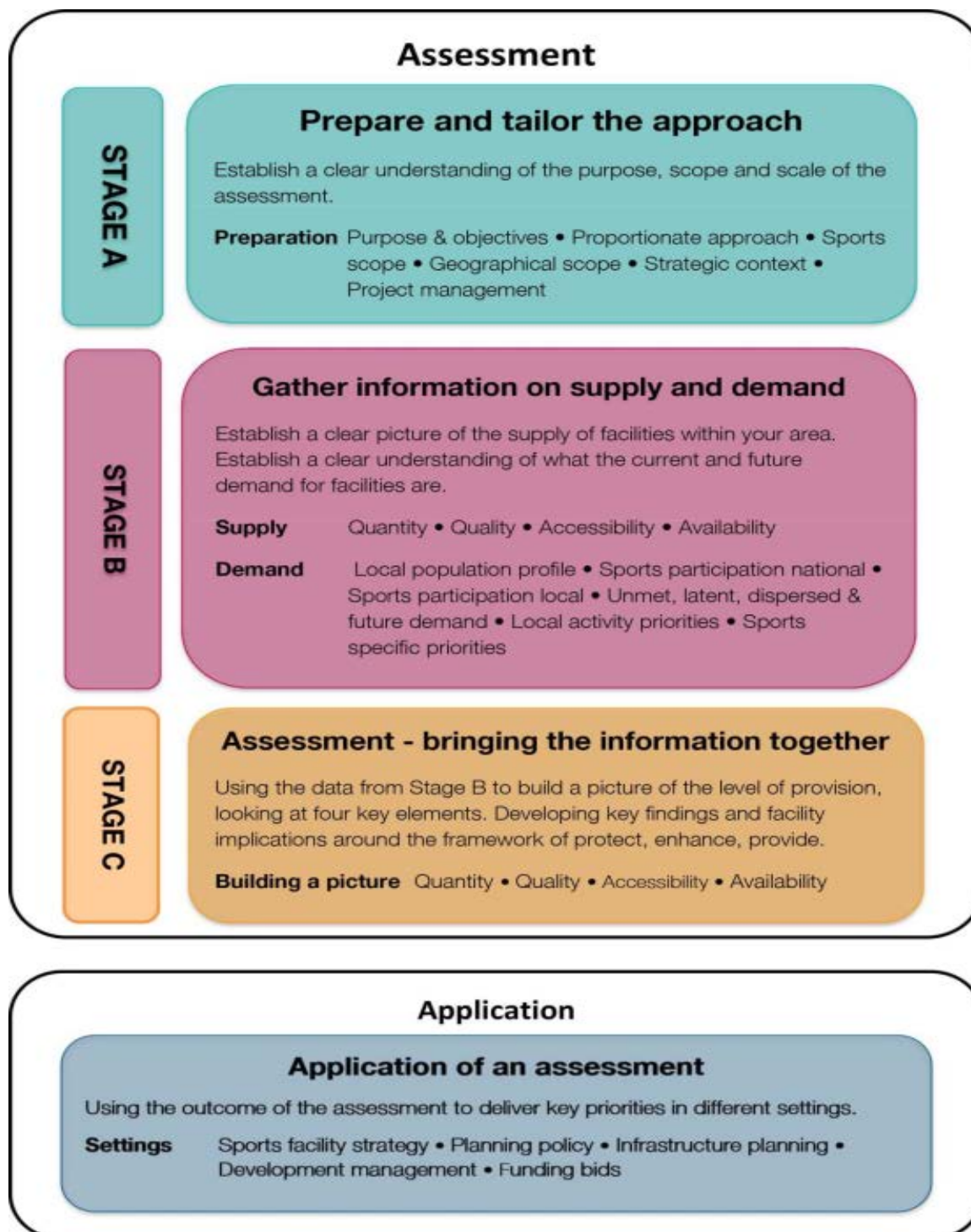


## SECTION 3: INDOOR SPORTS FACILITIES ASSESSMENT APPROACH

### 3.1 Methodology

The assessment of provision is based on the Sport England Assessing Needs and Opportunities Guide (ANOG) for Indoor and Outdoor Sports Facilities

Figure 3.1: Recommended approach



This provides a recommended approach to undertaking a robust assessment of need for indoor and outdoor sports facilities. It has primarily been produced to help (local authorities) meet the requirements of the Government's NPPF, which states that:

*'Access to high quality open spaces and opportunities for sport and recreation can make an important contribution to the health and well-being of communities. Planning policies should be based on robust and up-to-date assessments of the needs for open space, sports and recreation facilities and opportunities for new provision. The assessments should identify specific needs and quantitative or qualitative deficits or surpluses of open space, sports and recreational facilities in the local area. Information gained from the assessments should be used to determine what open space, sports and recreational provision is required.'* (NPPF, Paragraph 73)

The assessment of provision is presented by analysis of the quality, quantity, accessibility and availability for the identified facility types (e.g. sports halls and swimming pools). Each facility is considered on a 'like for like' basis within its own facility type, so as to enable it to be assessed for adequacy.

The report considers the distribution of and interrelationship between all facility types in study area and evaluates demand. It gives a clear indication of areas of high demand. It will identify where there is potential to provide improved and/or additional facilities to meet this demand and to, where appropriate, protect or rationalise the current stock.



## SECTION 4: SPORTS HALLS

Indoor multi-purpose sports halls are one of the prime sports facilities for community sport as they provide venues suitable to allow a range of sport and recreational activities to be played. The standard methodology for measuring sports halls is the number of badminton courts contained within the floor area.

Sports halls are generally considered to be of greatest value if they are of at least 3+ badminton court size with sufficient height to allow games such as badminton to be played. It should be noted, however, that a 4-court sports hall provides greater flexibility as it can accommodate major indoor team sports such as football (5-a-side and training), basketball and netball. It also has sufficient length to accommodate indoor cricket nets and indoor athletics as such offering greater sports development flexibility than its 3-court counterpart.

Larger halls, for example six or eight courts, can accommodate higher level training and/or competition as well as meeting day to day needs. They may also provide the option for more than one pitch/court which increases flexibility for both training and competition and, for example, enable the hosting of indoor central venue leagues for sports such as netball.

This assessment considers all facilities in Sunderland that comprise at least one badminton court (and measure at least 10m x 18m offering an area of 180m<sup>2</sup>). It thus initially includes all those that can accommodate sport and recreational activities including activity halls and village halls. Specialist centres, such as dance or gymnastics centres, are excluded.

### 4.1 Sport England Facilities Planning Model (FPM)

The Sport England Facilities Planning Model for Sunderland was undertaken using the 2015 National Facilities Audit Data. The key summary of the FPM analysis for sports halls (which takes account of three badminton courts and above) identifies that:

#### **Supply**

- ◀ There are 31 halls available for community use (3+ badminton courts in size, and with ancillary halls where on the same site). However, Raich Carter Sports Centre was excluded from the model due to data error and the hall at Silksworth Sports Centre is not included as it is a purpose built indoor tennis centre.
- ◀ Some sites (21) include more than one hall and there is, in Sunderland, a total of 129 badminton courts. When scaled to take account of hours available for community use, this is reduced to 75 courts.
- ◀ The courts available per 10,000 population equate to 4.7 in Sunderland in comparison with 5.5 in the North East and 4.4 in England.
- ◀ The FPM also indicates that, based on its assessment of attractiveness, a lower weighting is given to educational owned and managed halls. The facilities with the highest weightings are Houghton Sports Centre, Sans Street Youth Centre, Seaburn Centre and the new Washington Leisure Centre.
- ◀ Supply is dominated by four court halls in secondary schools. The largest venues are halls at Monkwearmouth School (8crt), Seaburn Centre (8crt) and the University of Sunderland (6crt). The FPM incorrectly identifies Monkwearmouth as a 6 court hall.
- ◀ In terms of age, stock is fairly modern; most school facilities were built after 2000.
- ◀ Currently 34% of the residents of Sunderland do not have access to a car. This is high in comparison to National (c. 25%) and Regional (c. 30%) averages.

The key aspect of this study, therefore, is to set into context the current position in Sunderland with regard to the supply and demand of sports halls across the City and

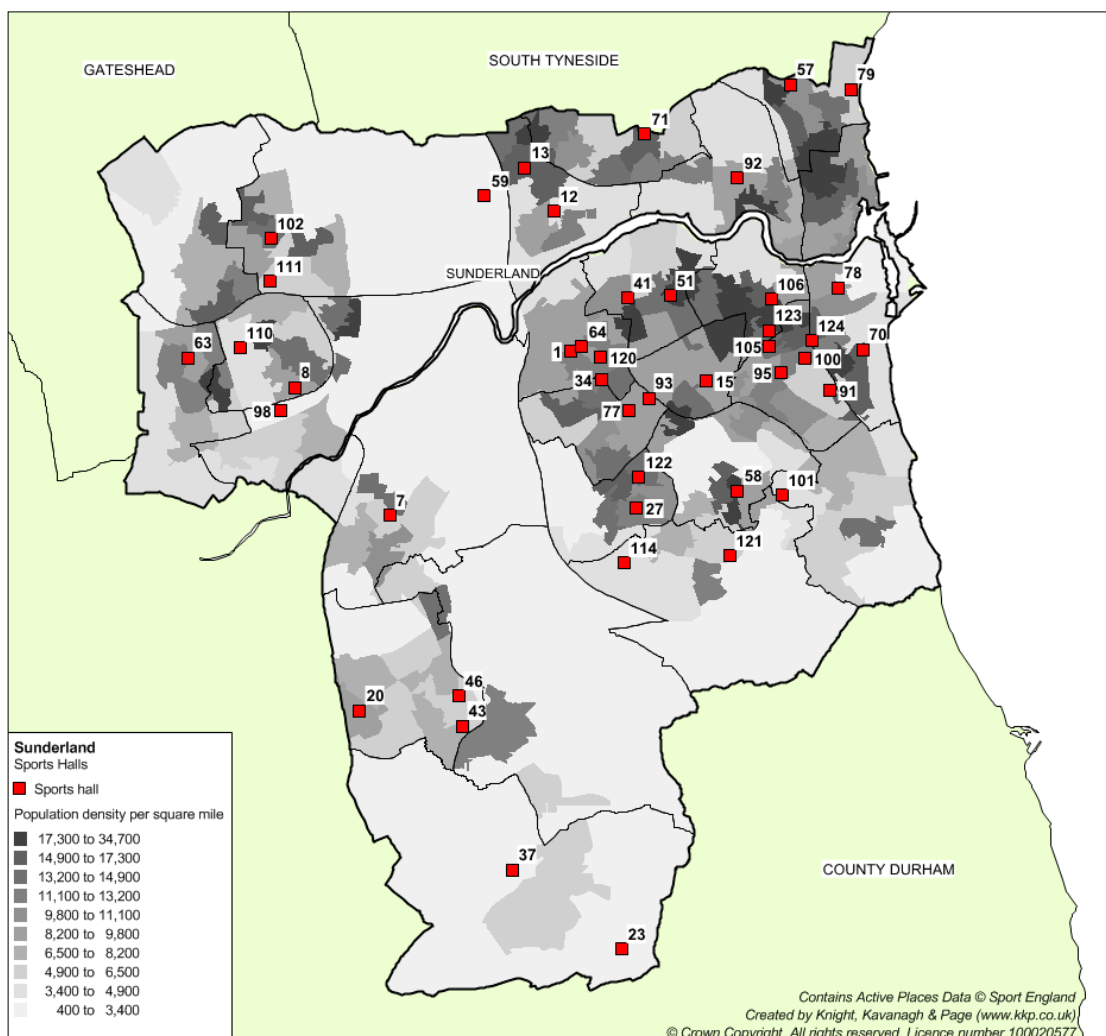
consider the accuracy of the FPM study. Two scenario's will be examined which are the inclusion of the Seaburn Centre within the study and the exclusion of Seaburn Centre. This should provide an indication of over or under supply across the city.

## 4.2 Supply

### Quantity

Via audit and quality assessments, it has been identified that there are 57 sports halls with the equivalent of 158 badminton courts<sup>6</sup> (when considering **all** sports halls in Sunderland i.e. they have at least one badminton court). Of these 29 have three courts or more (this considers Seaburn as one 8-court hall rather than the two 4-court halls which the FPM identifies) suggesting that Sport England's FPM is incorrect. A list of all the sports halls (and the number of courts) in Sunderland can be found in Table 4.1 below (which differs from that found in the FPM).

Figure 4.1: All sports halls in Sunderland



<sup>6</sup> The FPM does not include 1 and 2 court halls

Table 4.1: All sports halls and activity halls in Sunderland (excluding dance and studios)\*

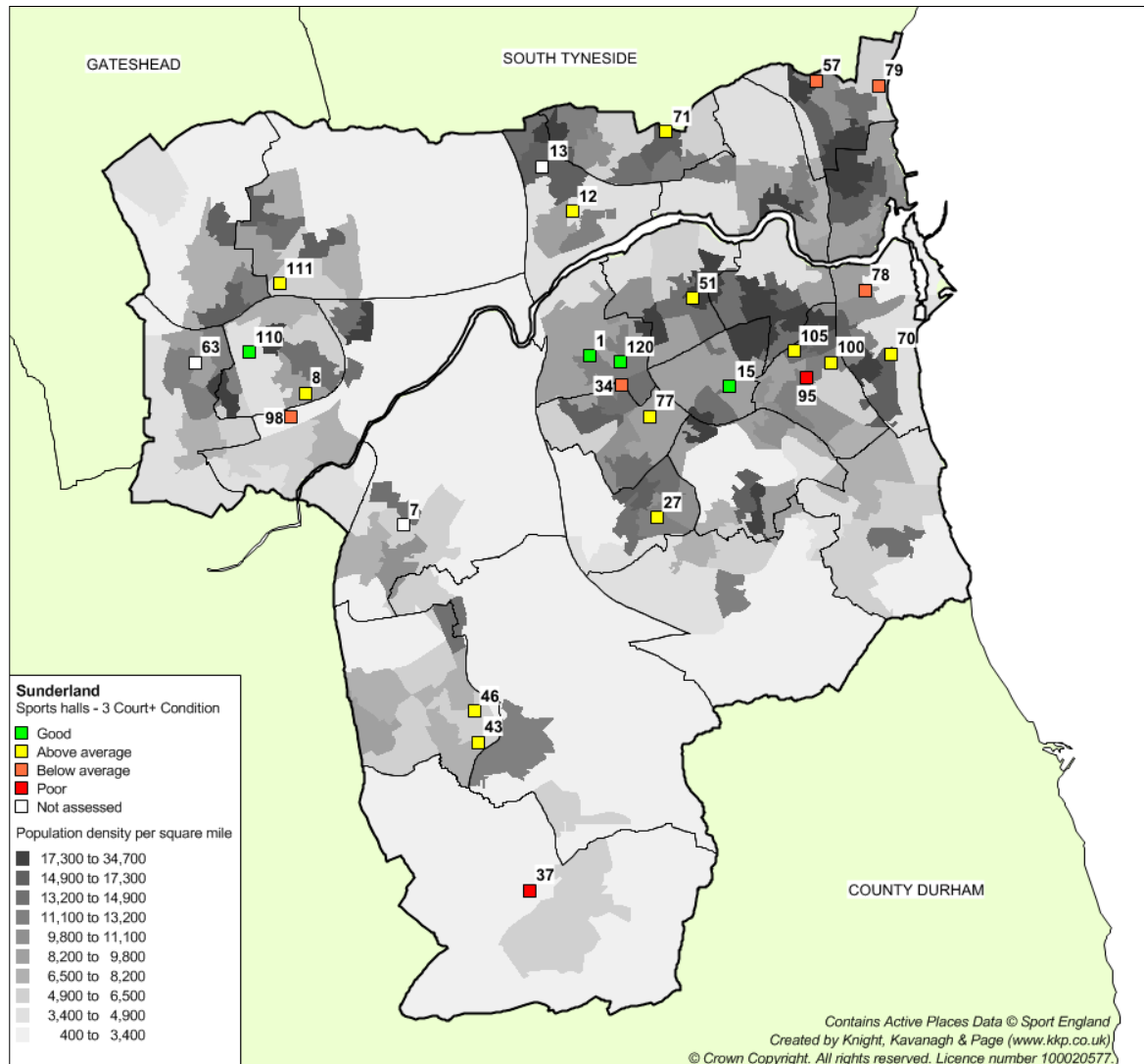
Ref	Site Name	Cts.	Ref	Site Name	Cts.
1	Academy 360	4	71	Red House Academy	4
7	Barnwell Primary School	3	77	Sandhill View Centre	4
8	Biddick Academy	4	78	Sans Street Y & Centre	3
8	Biddick Academy	1	79	Seaburn Centre	4
12	Castle View Sports Centre	4	79	Seaburn Centre	4
13	Castlegreen Community School	4	91	Southmoor Academy	1
15	City of Sunderland College	4	91	Southmoor Academy	1
15	City of Sunderland College	2	92	Southwick Community Primary School	2
20	Dubmire Junior School	1	93	Springwell Dene School	2
23	Easington Lane Primary School	1	95	St Aidens Roman Catholic Academy	4
27	Farringdon Comm. Academy	5	98	St Robert of Newminster School	4
27	Farringdon Community Academy	1	98	St Robert of Newminster School	1
34	Grindon Young Peoples Centre	3	100	Sunderland High School - Junior School	4
37	Hetton Comp. School	4	101	Venerable Bede C of E Academy	3
37	Hetton Comp.School	1	102	Washington Millennium Centre	2
41	Highfield Comm. P. School	2	105	Thornhill School	1
43	Houghton Kepier Sports College	1	105	Thornhill School	1
43	Houghton Kepier Sports College	5	105	Thornhill School	4
46	Houghton Sports Complex	4	106	University of Sunderland City Space	6
46	Houghton Sports Complex	1	110	Washington Leisure Centre	4
51	Lambton Street Y Centre	3	110	Washington Trampoline hall	1
57	Monkwearmouth School Sports Centre	8	111	Washington Secondary School	4
57	Monkwearmouth School Sports Centre	1	114	Wearside Health & Racquets Club	4
58	New Silksworth Independent Methodist Church	1	120	Grindon Hall Christian School	3
59	Nissan Sports & Social Club	2	121	Mill Hill Primary School	2
63	Oxclose Comm. Academy	4	122	Farringdon Academy	1
64	Pennywell Comm. Centre	2	123	St. Anthony's Girls' Academy	1
70	Raich Carter Sports Centre	4	123	St. Anthony's Girls' Academy	1
			124	Bethany Christian Church	2
<b>Sub Total</b>		<b>80</b>	<b>Sub Total</b>		<b>78</b>
<b>Total number of courts</b>		<b>158</b>			

\*this table identifies all known spaces prior to their exclusion once the ANOG methodology is applied where only 3 court spaces and above are considered.).

As Figure 4.1 illustrates many of the 29 3+ court sports halls are located in the more densely populated areas (this accounts for Seaburn as one 8 court hall as opposed to two 4 court halls). Just over 10% of sports hall space in the City comprises one court halls. This space, while often appropriate for mat sports or exercise to music and similar provision, is limited in terms of the range and scale recreational and sporting activities it can accommodate.

In complying with Sport England's ANOG methodology, a quality assessment was carried out at all (available sites) which are of 3+ courts (as they are far more flexible in accommodating a variety of sports). The results are set out overleaf in Figure 4.2 and Table 4.2.

*Figure 4.2: Sports halls – 3 court plus, community use only, by condition (29 in total)*



(The quality assessment carried out in July 2015)

Table 4.2: 3+ courts hall with condition and levels of community use (29 sites in total)

Ref	Site Name	Cts	Comm. use	Condition	Changing facility condition
1	Academy 360	4	Term-time only	Good	Good
7	Barnwell Primary School	3	Sports Club/CA.	Not assessed	Not assessed
8	Biddick Academy	4	Yes	Above average	Good
12	Castle View Sports Centre	4	Yes	Above average	Below average
13	Castlegreen Community School	4	Sports Club/CA*.	Not assessed	Not assessed
15	City of Sunderland College	4	Yes	Good	Good
27	Farringdon Community Academy	5	Yes	Above average	Below average
34	Grindon YP Centre	3	Yes	Below average	Poor
37	Hetton Comp. School	4	Yes	Poor	Below average
43	Houghton Kepier Sports College	5	Yes	Above average	Above average
46	Houghton Sports Complex	4	Yes	Above average	Above average
51	Lambton Street YC	3	Yes	Above average	Above average
57	Monkwearmouth School Sports Centre	8	Term-time only	Below average	Below average
63	Oxclose Community Academy	4	Sports club/ CA*.	Not assessed	Not assessed
70	Raich Carter Sports Centre	4	Yes	Above average	Below average
71	Red House Academy	4	Yes	Above average	Good
77	Sandhill View Centre	4	Yes	Above average	Below average
78	Sans Street Youth & Community Centre	3	Yes	Below average	No facility
79	Seaburn Centre	8	Yes	Below average	Below average
95	St Aidens RC Academy	4	Term-time only	Poor	Below average
98	St Robert of Newminster School	4	Yes.	Below average	Above average
100	Sunderland High School - Junior School	4	Yes	Above average	Below average
101	The Venerable Bede C of E Academy	3	No	Above average	Above average
105	Thornhill School	4	Yes	Above average	Below average
106	University of Sunderland City Space	6	No	Good	Good
110	Washington Leisure Centre	4	Yes	Good	Good
111	Washington Secondary School	4	Yes	Above average	Good
114	Wearside Health & Racquets Club	4	Registered member use	Not assessed	Not assessed
120	Grindon Hall Cristian School	3	Term-time only	Good	Good
<b>Total</b>		<b>122</b>			

\*community association

## Quality

Of the 29 sites with 3+ court sports halls, only four were unable to be assessed (one of which is a commercially operated site). The quality of the sports hall stock in Sunderland varies widely (see Table 4.2). Much of it has either been refurbished or rebuilt since 2000 with the result that many sites are assessed as being above average. Five of the sports halls are considered to be of good quality; mainly facilities built in the last three to five years. The only facility classed as good quality is Washington Leisure Centre.

Five sports halls are below average, two are in poor condition which leaves 13 considered to be above average. In most instances the quality of changing facilities reflects that of the sports halls and only one changing room is identified as poor – the one at the Grindon Young People's Centre.

## Availability

Five of the main sports halls are managed by Everyone Active as part of the new joint venture arrangement with SCC. These sites are fully open to the public, although Seaburn has a significant volume of block bookings restricting pay and play access. Table 4.3 indicates the community use in facilities not directly managed by Everyone Active and the main sports activities undertaken within them.

Table 4.3: Community use of sports halls in Sunderland

Availability	Site	Cts	Main sports played
Up to 10 hrs	University of Sunderland	6	Badminton, Basketball, Netball
	Venerable Bede C of E Academy	3	No outside usage
	Grindon Hall Christian School	3	Limited to dance and gymnastics
10-20 hours	Academy 360	4	Majority use; football
	Barnwell Primary School	3	Football, Netball, Basketball
	St Roberts of Newminster School	4	Badminton, Basketball, Cricket
	Sunderland High School	4	Football, Cricket
	Castlegreen Community School	4	Football, Badminton, Basketball
	Thornhill School	4	Football, Cricket, Basketball
	City of Sunderland College	4	Football, Basketball, Trampolining
	Red House Academy	4	All football
	Washington Secondary School	4	All football
	St Aidan's RC Academy	4	Football, Rugby, Basketball, Badminton
	Biddick Academy	4	No football. Basketball, Badminton
	Castle View Sports Centre	4	Football, Badminton, Roller Skating
>20 hours	Farringdon Community Academy	5	Basketball, Cricket, Badminton, Football
	Grindon Young Peoples Centre	3	Football, Table Tennis
	Hetton Comprehensive School	4	Football, Gymnastics, Badminton, Rugby, Cricket
	Houghton Kepier Sports College	5	Football, Athletics, Archery, Cricket
	Lambton Street Youth Centre	3	Boxing, Karate, Judo, Football, Basketball, Gymnastics
	Monkwearmouth School	8	Football, Basketball, Badminton
	Oxclose Community Academy	4	Badminton, Basketball, Table Tennis
	Sandhill ViewCentre	4	Badminton, Zumba, Table Tennis, Football, Walking football,

Availability	Site	Cts	Main sports played
			Gymnastics, Cheerleading, Karate
	Sans Street Community Centre	3	Mainly Football
	Wearside Health & Racquets Club*	4	Tennis, Badminton, Yoga/Pilates/Zumba

*\*not recognised as community accessible as it requires membership for access*

Table 4.3 indicates that a wide variety of sports is on offer. Some facilities are dominated by football, which restricts the development of other indoor sports. Nine schools and Academies offer between 10 and 20 hours of community use per week, whilst eight offer between 20 and 40 hours. This latter group suggests that they offer time at weekends as well as during peak periods on weekday evenings. Most schools indicated that they are not keen to offer more time for community use and much of that offered is during term time only.

Management of facilities is handled by Everyone Active schools and academies, youth and community groups and private operators. The landscape has changed since June 2015 when SCC entered into a partnership agreement with Everyone Active (the operating name of SLM Ltd). In addition, schools are now much more independent in terms of their operation – in particular academies. This means that public and community access can be more restricted and the potential to work together more variable.

*Table 4.4: Management of facilities by size of sports hall*

Venue	Total	3 Court	4 Court	5 court	6 court	8 court
Everyone Active leisure centres	4		3*			1
Schools	18	3	13	2		1
University/FE College	2		1		1	
Others	4	3	1			
<b>Total sports halls</b>	<b>29</b>	<b>6</b>	<b>18</b>	<b>2</b>	<b>1</b>	<b>2</b>
<b>Total courts</b>	<b>122</b>	<b>18</b>	<b>72</b>	<b>10</b>	<b>6</b>	<b>16</b>

*(\* Includes Seaburn)*



The facilities below are identified within the audit but not within the FPM (for a variety of reasons). They obviously contribute to the supply of facilities as identified in the availability column. The assessment suggests that it is unlikely that there will be any significant improvement to what they already offer, due to the condition of the facility currently or the attitude of the establishment to increasing availability of use for the community. As mentioned earlier the FPM also fails to recognise Raich Carter Sports Centre within its assessment.

Facility	Condition	Availability
Castlegreen Community School	Not assessed	10 – 20 hours
City of Sunderland college	Good	10 – 20 hours
Grindon YP Centre	Below average	20 > hours
Hetton Comprehensive School	Poor	20 > hours
Sandhill View Centre	Above average	20 > hours
Venerable Bede C of E Academy	Above average	Up to 10 hours
Grindon Hall Christian School	Good	Up to 10 hours

### **Accessibility**

The data indicates that 83.3% of the population resides within a 20 minute walk of a sports hall and 16.7% thus live outside of this catchment. Figure 4.3, overleaf, shows that the areas of high population are generally within a catchment of a main sports hall. The full break down can be found in Appendix 3

*Table 4.5: Population within a 3 court+ sports hall catchment with community use*

<b>Sunderland : community use 3 court+ sports halls</b>	<b>Population</b>	<b>Percentage</b>
Population within 20 minute walk - radial catchment	236,153	83.3%
Population out with 20 minute walk - radial catchment	47,356	16.7%
<b>Total</b>	<b>283,509</b>	<b>100.0%</b>

The data also indicates that over 36% of the population who live in the most deprived (worst 20% IMD) wards are within 20 minute walk time catchment of indoor sports halls. This rises to over 50% when taking into consideration those living in the 30% most deprived wards.

### **Seaburn Centre**

With the proposed development of the Marina, there is a possibility that the Seaburn Centre will be closed in the medium term (c. five years) as part of a wider and different leisure offer. Its removal ( Figure 4.3:ref 79) does not affect the percentage of the population which are within 20 minute walk time of sports halls as Monkwearmouth Sports Centre is located close by.

It should be noted, however, that Monkwearmouth Sports Centre and changing rooms are considered to be below average quality. The facility currently opens to the public for c. 24 hours per week (term time only) although it planning to increase this by eight hours per week from September 2015. Indoor activity at the school is dominated by football although it also offers basketball and badminton and has recently signed up to the Tyne & Wear Satellite Club Initiative for gymnastics. It is, therefore, considered unlikely that, much if any displacement of sports activity from the Seaburn Centre will be catered for at Monkwearmouth Sports Centre (if the facility closes). There will, therefore be a reduction in accessible badminton of eight courts.



Figure 4.3: Catchment areas of main sports halls in Sunderland

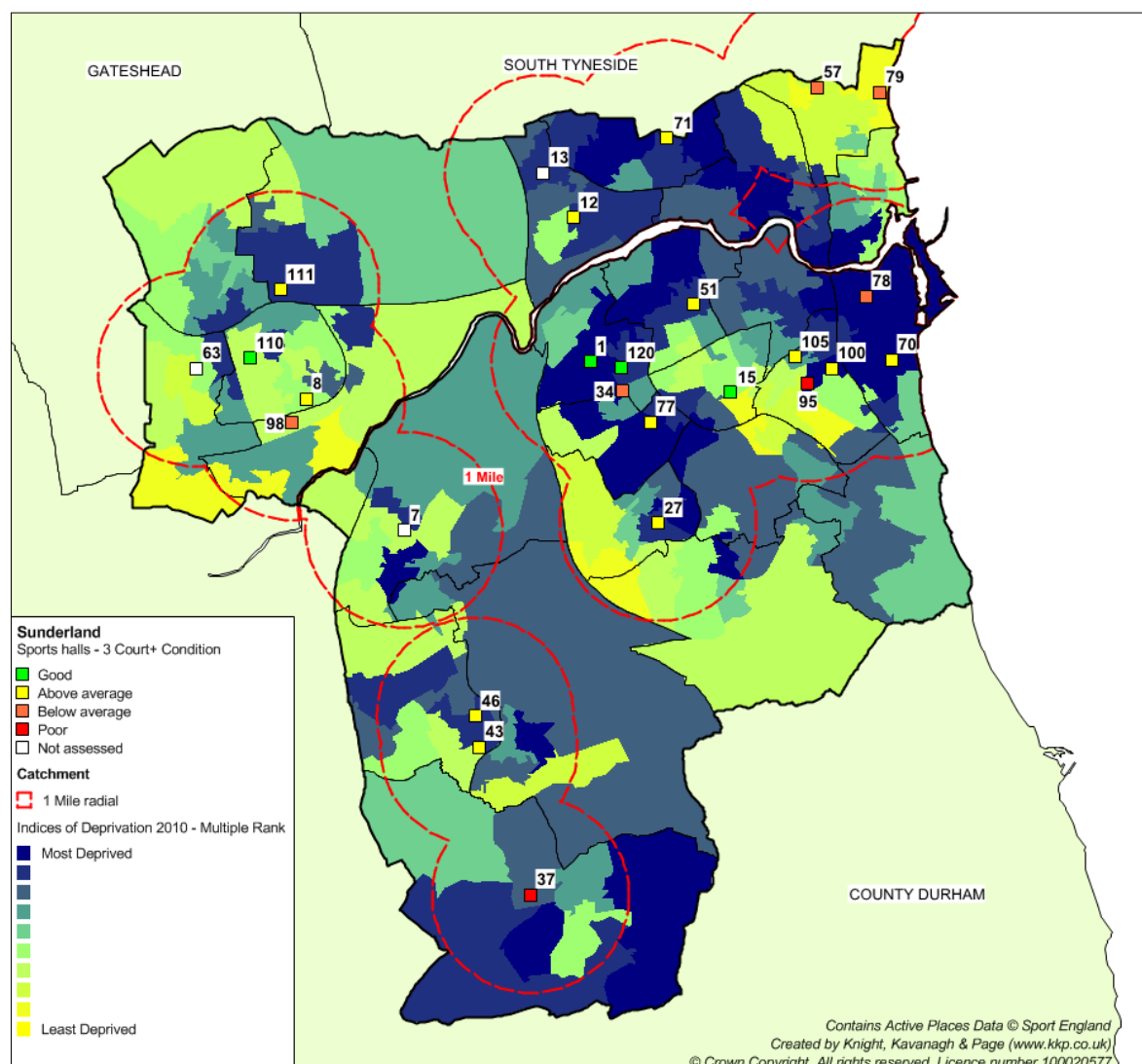


Figure 4.4, overleaf identifies 4 court sports halls located within 2 miles of the Sunderland local authority boundary. Four of these are within a 20 minute walk time of small areas of the City authority. 18 sports halls are identified, five of which are in Durham, eight in Gateshead and five in South Tyneside.

Table 4.6: Number of community accessible sites and courts per regeneration area

Regeneration area	Number of accessible sites	Number of courts
Coalfield	4	16
Sunderland East	8	32
Sunderland North	5	28
Washington	5	20
Sunderland West	7	26
Total	29	122

Accessibility is also influenced by facilities possibly located outside of the local authority boundary. Figure 4.4 and Table 4.6 identify those facilities which are located within two miles of the border for analysis purposes

Table 4.7 gives an overview of the number of sites and courts per regeneration area. This does not take account of the quality or level of availability to the community. For example, although Sunderland East looks to have the most available sites and badminton courts available, the supply is made up of one commercial operator, the University, four high schools, one youth club and Raich Carter, which apart from Raich Carter all have restrictions on the amount of community use available.

Figure 4.4: 3 Court+ sports halls within Sunderland and 4 court+ within 2 miles (with 20 minute walk time radial catchment)

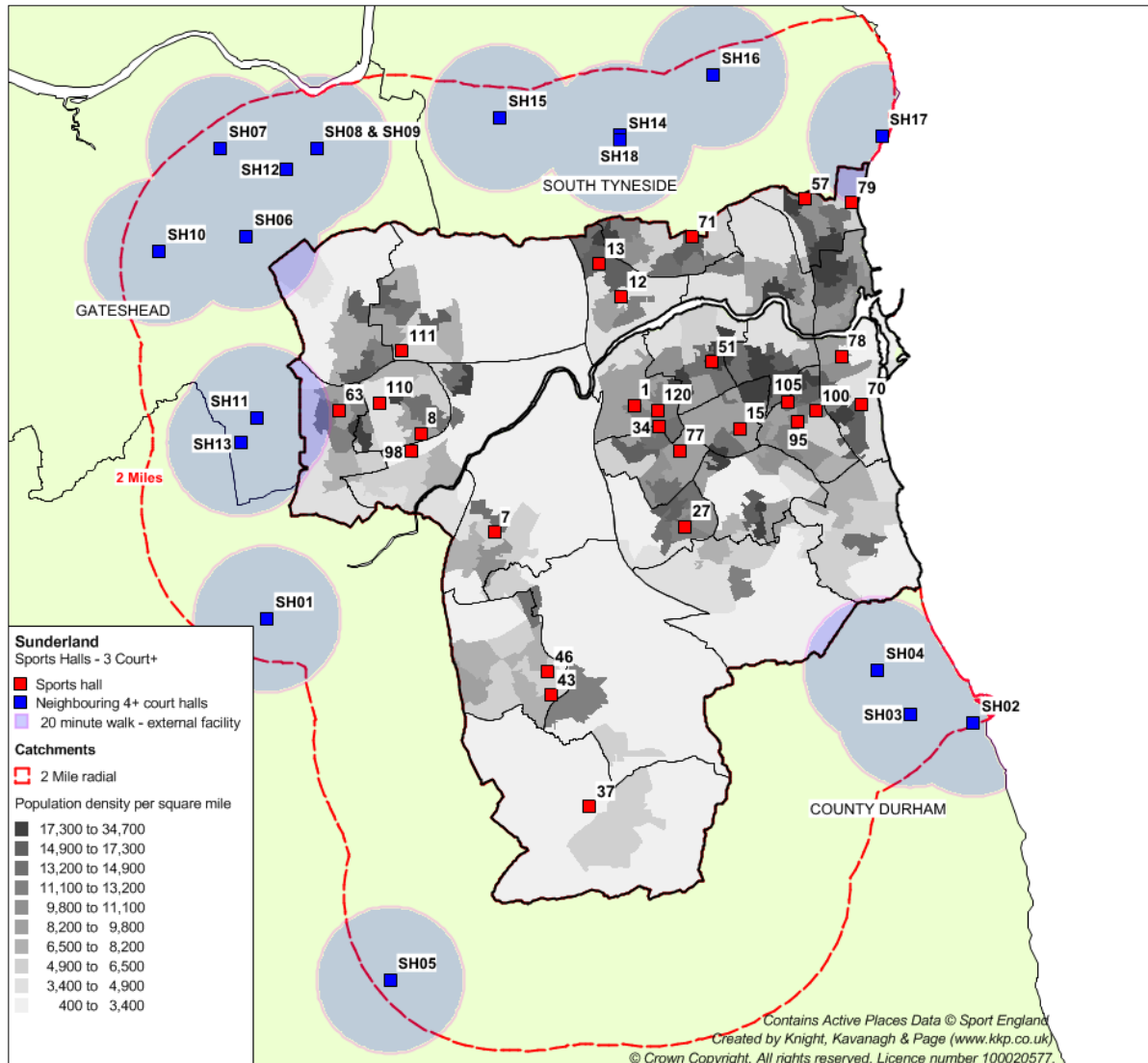


Table 4.7: 4 Court sports halls within 2 miles of the City of Sunderland boundary

ID	Active Places Site Name	Courts	Local authority
SH01	Park View Academy (Upper School)	4	County Durham
SH02	Ropery Walk Primary School	4	County Durham
SH03	Seaham Leisure Centre	4	County Durham
SH04	Seaham School Of Technology	4	County Durham
SH05	Belmont School Community Arts College	4	County Durham
SH06	Cardinal Hume Catholic School	4	Gateshead
SH07	Elgin Centre	4	Gateshead
SH08	Heworth Grange Comprehensive School	4	Gateshead
SH09	Heworth Grange Comprehensive School	4	Gateshead
SH10	Joseph Swan Academy	4	Gateshead
SH11	Lord Lawson Of Beamish Community School	4	Gateshead
SH12	Thomas Hepburn Community Academy	4	Gateshead
SH13	Birtley Leisure Centre	4	Gateshead
SH14	Boldon School	4	South Tyneside
SH15	Hedworthfield Community Association	4	South Tyneside
SH16	South Shields Community School	4	South Tyneside
SH17	Whitburn C Of E Academy	4	South Tyneside
SH18	Boldon Community Association	4	South Tyneside

Figure 4.4, therefore, clearly indicates that the facilities located on the outskirts of SCC are not accessible using the 20 minute walk time radial catchment model.

### Future Supply and potential developments

It is worth noting that the supply of sport hall availability may change within the next few years. It is expected that Hetton comprehensive School sports hall will be replaced in 2016. This facility already offers significant community use and it is likely that this community use will be transferred to the new facility.

Monkwearmouth School Sports Centre is in need of an upgrade and the School is keen to work in partnership with SCC and others, especially with the potential closure of Seaburn Centre. It has aspirations to develop facilities which will include a 3G pitch. If this was to occur, this could extend the availability for community use in the current sports hall. Whilst there is good parking and general access, this facility is still in need of significant investment (if it is going to appeal to the general public) and is unlikely to be available for community use during the day due to school demand (despite having a separate community use access).

St Anthony's Girls Academy is also identified as a facility which will be replaced (with a 4 court sports hall) in 2016. Consultation indicates that there has not been a culture of community use in the past and that this is unlikely to change significantly in the future. It would, therefore, be inappropriate to consider this facility amongst other facilities which are available for community use.

The Foundation of Light has applied to develop what it entitles as a Centre for Opportunities on the Stadium of Light site. Key to this delivery is the development of a 12 court sports hall and ancillary facilities. It is expected that this facility will have significant community use due to the ethos of the Trust and the size of the facility.

## Summary of supply

There are 57 sports halls with at least one badminton court in Sunderland; of these 29 have three courts or more. Of these 29 main sports halls, 28 are available for community use (four fewer than those identified within the FPM). There are two eight court halls (Monkwearmouth and Seaburn), one six court hall with the remaining being a combination of four and three courts in size.

The FPM does not include the facilities of Raich Carter (a data error), Castle Green Community School (no opening times), City of Sunderland College (private use), Grindon Young People Centre (too small), Hetton Comprehensive School (too small), the Venerable Bede Church of England School and Grindon Hall Christian School (not listed).

The audit identified that Castle Green does have some community use, as does the Grindon Young People's centre and Hetton Comprehensive School has a four court hall (albeit of poor quality). The Venerable Bede School does not have any external use.

Sports halls are generally located in the more densely populated and the more deprived areas of the authority. Most stock is in good or above average condition with six sites assessed as below average in addition to the poor facility at Hetton School.

The amount of community use varies throughout the City. Many facilities are dominated by indoor football, which reduces time available for the development of other sports. Twenty of the sports hall are situated on education sites, a large proportion of the current stock. Much of the time offered for community use on education sites is generally available in term time only and, in many instances, ceases during exam periods also. Further, only two facilities suggest that they are available to extend community use time.

SCC has entered into a partnership with Everyone Active to manage its indoor sports facilities which includes the sports halls at Raich Carter, Washington, Seaburn and Houghton leisure centres.

The sports halls are situated throughout the City and 83% of the population reside within a 20 minute walk of one.

The supply of facilities could vary significantly if, for example, the Seaburn Centre closes and/or if a new facility is built.

### 4.3 Demand

Statistics for APS 8, covering the period October 2014 – March 2015, show that 15.5 million people did some kind of sport once a week, every week. This figure is 222,000 lower than the equivalent measure taken six months ago.

The largest falls are in swimming participation (despite this, swimming is still Britain's most popular activity with 2.5 million participants per week), followed by running (2.2 million) and cycling (2.1 million), football (1.9 million) and golf (0.73million). Sports in which participation is currently on the rise include running, tennis and basketball.

Since the survey began in October 2006, it has consistently demonstrated that adults from higher socio economic groups are more likely to take part in sport than the converse. Appendix 2 contains Sport England Active People Survey and Market Segmentation data for Sunderland. The data suggests some latent demand for sports hall sports.

#### **Future demand**




It is projected that the overall number of people in Sunderland will rise by 2,616 (+0.9%) by 2025 but with the following differences in age profile of the population:

- ◆ +1,119 (+2.3%) more 0-15 year olds; and
- ◆ -8,243 (-20.6%) fewer 45-54 year olds; and
- ◆ +2,146 (+6.0%) more 55-64 year olds; and
- ◆ +10,686 (+27.2%) more people aged 65+.

As identified earlier (page 21) the most significant change is the increase in people aged 65+ which will result in different programming requirements in sports halls and increased demand for use at different times (most notably during the day time). This may be offset by the predicted decreasing in 16-24 year olds which could lead to less demand for sports hall activities.

The Sport England segments that fit this age profile are listed in Table 4.6. The top sports are swimming and keep fit/gym and football, suggesting that the reduction in numbers on this age group will not have a significant impact on sports hall participation.

*Table 4.6: Segments predicted to decrease in Sunderland by 2024.*

Segment		Segment description	Segment sporting behaviours
	<b>Philip</b> Comfortable Mid Life Male	Mid-life professional, sporty males with older children and more time for themselves. <i>Full time job and owner occupied, children, married.</i>	Philip's sporting activity levels are above the national average. Philip's top sports are cycling (16%), keep fit/ gym (15%), swimming (12%), football (9%), and golf (8%)
	<b>Elaine</b> Empty Nest Career Ladies	Mid-life professionals who have more time for themselves since their children left home. <i>Full time job and owner occupied, married.</i>	Elaine's sporting activity levels are similar to the national average. Elaine's top sports are keep fit/ gym (21%), swimming (18%), cycling (7%), athletics including running (3%) and tennis (2%).
	<b>Brenda</b> Older Working Women	Middle aged ladies, working to make ends meet <i>Part-time job, married.</i>	Brenda is generally less active than the average adult. Brenda's top sports are keep fit/ gym (15%), swimming (13%), cycling (4%), athletics including running (2%) and badminton (1%)

## ***Facilities Planning Model***

Sport England's FPM is based on the calculated demand as outlined below; data is once again taken from the June 2015 National Run of the Sport England FPM Sunderland Profile Report.

### ***Satisfied demand***

- ◀ The amount of demand within an area will be affected by the age and gender profile of the population. Demand for sports halls from Sunderland residents equates to 18,600 visits per week in the peak period which is equivalent to 85 badminton courts. This takes into account a 'comfort factor'.
- ◀ The model further estimates that 77% of satisfied demand is retained within Sunderland and 23% is satisfied by facilities in neighbouring council areas. This means that a high percentage of demand is being exported to facilities outside Sunderland, indicating a deficit of facilities in Sunderland itself.
- ◀ Unmet demand is not primarily due to a lack of sports hall capacity, which accounts for only 9%. Most unmet demand is from residents who do not have access to a car and who live outside the walking catchment of a sports hall.
- ◀ The overall level of unmet demand across the area can be converted into an equivalent capacity of nine badminton courts, although it is spread across areas of low car access throughout the whole council area means that it could not be captured at one (or even more than one) location.

### ***NGB consultation***

#### ***Badminton***

The National Facilities Strategy (2012-2016) vision is 'that everyone in England should have access to a badminton court that enables them to play at the right level - for them'. The APS data indicates that Badminton participation (once a week participation: 1x30 minutes for ages 16+) has fallen by nearly 10% to 490,200 nationally in the last two years. Sunderland is currently a Priority Two area for Badminton England.

Badminton England works within a framework to try and increase participation which includes:

- ◀ **Play Badminton:** Working with partner leisure operators to increase casual badminton participation, increase court usage and increase income. Supported by BE staff and national marketing and encompasses several ways to play using an audit process to identify appropriate sites and operators to work with across the regions
- ◀ **No Strings Badminton:** Social pay and play weekly sessions relaxed, social game-play ideal for casual players of all abilities (ages 16+), led by a friendly, welcoming session co-ordinator.
- ◀ **Essentials:** Beginners caching courses. Learn all the badminton basics at a relaxed pace with beginners coaching sessions over 6-8 weeks, led by BE qualified coaches.
- ◀ **Battle Badminton:** Casual Competition Leader boards; find new players (ages 18+) to play socially in matches where you pick the venue, set the rules and record your results online to earn points and rise the ranks in local and national leader-boards.
- ◀ **SmashUp!** Badminton for young people. Court time for 12-16 year olds where they can get involved with fun, big hitting badminton challenges with music and mates.

Consultation with BE suggests that the NGB would be very supportive of a new indoor facility within the city. Consultation indicates that ideally, it would prefer 12 courts and for

Seaburn to remain open as there is considered to be a local demand for more badminton. Badminton England has its own capital fund for such developments, but BE is aware that the level of monies involved will be very small compared to the overall cost of a new development. The size of a new facility would need to lend itself to hosting local, regional and national events.

There are four badminton clubs in the City; City of Sunderland, Oxclose Association, LNER and St Aidan's. St Aidan's Junior Badminton Club lacks facilities for women and girls as the school is boys only. It has links to the national structure and delivers a full and varied programme. The NGB also indicates that there are sufficient badminton coaches available in the North East, but will support a new development if it chooses to use the Essential programme, which requires a level 2 coach. BE is more concerned to ensure that it has adequate court time for developmental programmes given the continuing pressure on indoor facilities from other sports, especially football.

Sport England Market segmentation suggests latent demand for badminton of 2,472 people in Sunderland.

### *Basketball*

The APS data indicates that basketball participation (once a week participation: 1x30 minutes for ages16+) has fallen by just over 14% nationally to 131,100 in the last two years.

There are four clubs based in Sunderland; Oxclose, Sunderland City Predators, Biddick Community School and Sunderland College. Newcastle Eagles is the closest national league club and it currently engages with the Sunderland Foundation in delivering the Premier League 4 Sport Programme (PL4S). The Eagles will operate the PL4S opportunities for the 14+ age group from Sunderland College, Bolden School and Whitburn in 2015/16. The Club reports that there is limited capacity to grow the sport in Sunderland due to the current lack of sports hall space.

Consultation with Newcastle Eagles suggests that the success of the current PL4S programme means that the Eagles are looking to extend the basketball programme, in the first instance to under 12's, 14's and 16's age groups. It will be preferable for this programme to occur on the same evening which will support the new facility to become a centre for basketball development. The Eagles indicates that it has a pool of appropriately qualified coaches and volunteers who will be able to support this development. This will result in the development of a hub club in Sunderland, without any displacement from other facilities in the area. The key issue currently restricting development is the lack of appropriate facilities.

Newcastle Eagles also suggest that this facility will allow them to host both regional events and local basketball camps; this will significantly reduce the amount of travel young people currently have to undertake if they wish to progress in basketball. The ethos of the Foundation of Light, the PL4S programme and the development potential within local basketball community (in this case via the Newcastle Eagles programme) indicate that the development of a high quality facility which is accessible at the right time to local people will significantly support increases in basketball participation across the Sunderland area.. Sport England Market segmentation suggests latent demand of 576 people for basketball.

### *Netball*

The APS data indicates that netball participation (once a week participation: 1x30 minutes for ages16+) has fallen by just under 7% to 148,700 nationally in the last two years. Netball had, prior to this, shown growth, from APS7 to APS 8 of c.22,000.



Netball in Sunderland is administered by Netball North East. It has two clubs; Sunderland City Predators and Wearside Wildcats. Due to its size and being unable to find a suitable facility, Wearside Wildcats currently plays outside of Sunderland. It offers Netball from U11 right through to adults and is continuing to grow with 92 junior and 39 senior members. With programmes such as Back 2 Netball there is an opportunity for netball to grow further in the Area.

Consultation with England Netball in the North East indicates that it has an excellent relationship and already works closely with the Foundation of Light on the Premier League for Sport programme. England Netball identifies that its clubs find it very difficult to access appropriate facilities in the City, especially ones with access to two netball courts. It is, therefore, very supportive of indoor sports hall as it will allow the re-location of:

- ◀ Wearside Wildcats back into the City, where it will have the quality facilities and more facility time to help drive increased participation.
- ◀ Senior and junior leagues from South Shields which will also result in improved quality of facilities and time allocation leading to increased participation.
- ◀ The County Academy from poor facilities in Seaburn, which again will result in increased time allocation and improved quality facilities.

England Netball is also keen to support the Foundation of Light in delivery of Netball festivals and the Netball Now programme, which is likely to operate between 8 and 12 weeks per annum, depending on local demand. England Netball has sent a letter of support regarding this facility in the context of its ability to help drive up participation in Netball from all sections of the community.

### *Futsal*

Futsal is a game played between two teams of five players each. The game is played on a hard court surface delimited by lines where walls or boards are not used. Futsal is also played with a smaller ball with less bounce than a regular football. There are three sizes of facility are:

- ◀ Recreational and local competitions (15m x 25m)
- ◀ National league standard (16m x 31m)
- ◀ International competitions (18m x 38m)

There is only one marked out facility in Sunderland which is located at the University. This is not available for community use which constrains the opportunity for development in the area, other than for recreational play.

Futsal has seen a massive increase in popularity in the past two years (both nationally and regionally). In 2012-13 there was one men's recreational league (Darlington), six affiliated futsal teams (mens) and approximately eight referees. By 2015, this has risen to six FA Futsal Fives leagues (five run by Durham FA and one female league run by Hartlepool 6<sup>th</sup> Form College); this includes two senior men's and three youth leagues. A further three leagues are in the process of being established by external partners in 2015-16 (Stockton, Chester le Street and Bishop Auckland).

There has been over 1000% increase in affiliated teams since 2012-13 (which is set to increase again this season). In addition, there has been a corresponding increase in workforce with coaches and trained referees.

Consultation with the County FA indicates that a new facility will allow expansion of provision into Sunderland and drive participation at all levels for youth and adults. Hosting a new Youth League in Sunderland will also provide a potential opportunity for local



players aged 16-19 years who could be eligible to join the new talent pathway to the National teams; a new venue could offer an indoor training facility for clubs who have established futsal teams playing in local competitive leagues. These currently include:

- ◀ Washington AFC has five affiliated futsal teams with three junior teams taking part informally and the club running weekly training sessions
- ◀ Washington Juniors has also recently introduced futsal to its U10 and U14 teams,
- ◀ Silksworth CW Juniors has an U14 team and an U8 team playing regular futsal
- ◀ Washington Pumas Youth are an up and coming U11 futsal team who recently reached the FA National Youth Futsal Finals, representing the NE & Yorkshire. This team also train in futsal weekly.
- ◀ Sunderland AFC Deaf has recently joined the Men's Futsal League for the first time
- ◀ Sunderland Wear UTD Futsal also play in the Men's league

As identified above, there is increasing demand for futsal for all age groups. The key issue slowing its development is the lack of a proper futsal venue with more than one court and seating. A new indoor sports hall in the city offers the opportunity for hosting events and competitions that will bring in teams from all over the north. A facility which could be used for National League games will also help towards producing a future National League side or have the potential to be used for Regional/National competition and events. Consultation with the FA indicates that teams will travel to quality venues (both juniors, youth and adult) and this will be enhanced by local metro links.

The FA is keen to stress that a new facility will lead to additional activity rather than displacement and is likely to see the emergence of a central venue leagues for both adults and juniors (as the sport gains popularity). Leagues are operated in 8-10 week blocks and are especially popular during winter months, although there is increasing demand for competition all year round.

### *Volleyball*

APS 8 states that 25,000 people are participating in Volleyball (once a week participation: 1x30 minutes for ages 16+) which is down 10% from APS 6 data. There is one community club; Sunderland City Predators based at Sunderland University.

### *Gymnastics*

There are three gymnastics/trampoline clubs in Sunderland; AAA Sports, Tanya's Tumblers and Apollo Trampoline Club. Apollo has recently moved into a purpose built trampoline hall at Washington Leisure Centre and it reports that due to this there has been a recent improvement in the facilities it has available to it. Apollo has approximately 300 members with people travelling from as far away as Carlisle. It also has four satellite centres linked with it and has plans to expand further.

### *Handball*

There is one club based at Sunderland University but the nearest community club is based in Newcastle.

## **Summary of demand**

Data suggests that participation rates in Sunderland are above regional and national averages, however, within the Sport England segmentation data there is an identified latent demand of people who would like to participate in sports hall sports. The sports of netball, basketball, badminton and futsal are severely limited by the lack of appropriate, available facilities. All four sports identify that the development of a large sports hall will

allow them to increase participation, extend competition and develop local talent. All four sports also indicate that they have sufficient qualified workforce (coaches and volunteers) to support local development.

#### **4.4 Supply and demand analysis**

Sport England's FPM indicates that:

- ◀ In terms of overall hall provision per head of population, Sunderland is above the national average with 4.7 courts per 10,000 people compared with the national average of 4.4 courts, but below the north east regional figure of 5.5 courts.
- ◀ When the accessibility modelling is taken into account, the overall level of satisfied demand in Sunderland is 90% which is in line with national and regional figures. The model, however, estimates that only 77% of demand for sports halls in Sunderland is satisfied by facilities within Sunderland itself, indicating that facilities in neighbouring council areas are important in meeting demand from Sunderland residents.
- ◀ Most of the hall stock is located at and managed by schools and colleges although there is limited provision within the Everyone Active run sports centres. Many schools have limited opening hours for community use, which constrains their capacity.
- ◀ The model estimates that, in overall terms, 73% of sports hall capacity is being used at peak times; this is similar to the national figure but well above the north east regional average. This means that several facilities would need to operate at 100% capacity to meet demand.
- ◀ Overall Sunderland residents have a significantly lower relative share of sports hall provision (95) than the national average (set at 100) and regional average of 125.
- ◀ Unmet demand equivalent in courts (taking into account Sport England's 'comfort' factor) is nine courts.

#### **Conclusion**

Sports hall provision across Sunderland is of a reasonable quality and generally fit for purpose. The leisure centres, in particular, are full to capacity at peak periods. Schools and academies, on the other hand are not full, some do not open to the community at all while others are open for reduced hours or specifically during term time only.

The Seaburn Centre is a large facility, which has a high percentage of block bookings. There is a master-plan for the Seaburn area which could result in the closure of the site within circa. five years. This assessment has found that, if it was to close, it is unlikely that current users could accommodate their sporting needs at other local facilities.

The closest facility is an 8-court hall at Monkwearmouth School where the sports hall and changing facilities are considered to be below average; it is also only available during term time. In addition, Sunderland will lose a larger venue which has been used for events (cultural and sporting) in the past.

Participation rates in Sunderland are above regional and national levels, with an identified latent demand in a range of sports hall sports (based upon interrogation of Sport England Market Segmentation data). Consultation with a range of NGBs indicates a desire to increase participation further by expanding the number of sessions to attract participants. This desire is currently limited as the audit undertaken indicates that, although some may be accommodated within the existing built sports hall infrastructure, the size, quality and accessibility of some facilities is not strong. NGBs indicate that this is inhibiting the development of their sport, and extending facilities within academies and schools is unlikely to improve accessibility significantly. This is unlikely to happen given the

fragmentation within education and the increase in the number of independently managed academies *per se*.

## 4.5 Summary of key facts and issues

- ◀ The FPM indicates that there are 31 halls available for community use (3 badminton courts or more in size, and ancillary halls on the same site). This does not include Raich Carter Sports Centre.
- ◀ The audit identifies 293+ court sports halls (of varying size, quality and accessibility) in Sunderland. Of these 25 were assessed but it is known that all, apart from Wearside tennis and rackets club offer some level of community use (which in some instances is very minimal).
- ◀ The quality is variable, reflecting the age of certain halls across the City. Stock is however, mostly fit for purpose.
- ◀ 83% of the population resides within a 20 minute walk-time of a sports hall.
- ◀ Sunderland is well serviced by large halls with two 8-court facilities the Seaburn Centre and Monkwearmouth School) and one 6 court facility at Sunderland University (with very limited community use). The quality of Seaburn and Monkwearmouth is below average in both instances. They do, however, allow for regional competition meeting the needs for certain sports.
- ◀ There has been investment in the sports hall stock within education facilities since 2000 and Washington Leisure Centre (opened in 2015). St Anthony's is due to open a new sports hall in 2016 and the Foundation of Light is in the planning stage for a large indoor sports hall based at the Stadium of Light.
- ◀ Much of the community use identified in schools is only available in term time (and not available during exams). Although some capacity is identified within existing sports hall facilities to accommodate latent and unmet demand there is very limited desire by schools and academies to extend this from current levels.
- ◀ Market segmentation data identifies some latent demand amongst the local population for sports hall based activities.
- ◀ The FPM indicates a requirement an under supply of 9 badminton courts required to meet latent ,which as identified does not take account of Raich Carter, so is likely to be closer to 5 badminton courts (with the Seaburn Centre included).
- ◀ Consultation with a range of sports indicates that there is more demand for sports hall space in Sunderland than is currently available. In particular the sports of netball, basketball, badminton and futsal identifies that facilities are restricting development.
- ◀ The NGBs believe that a quality facility will attract new participants from across the City.
- ◀ The possibility of the development of the Seaburn Centre site would cause a substantial loss of sports hall space in the City. It is highly unlikely that the current stock of facilities could cope with all the displacement of physical activity that will occur as a result of this closure. With the scenario of the Seaburn Centre's 8 courts not being available there is likely to be a shortfall of c.13 courts to meet latent demand citywide.
- ◀ Due to the fragmentation of the education sector it is unlikely that there will be a substantial increase in the amount or coordination of community use available at school sites.

## SECTION 5: HEALTH AND FITNESS SUITES

Health and fitness facilities are normally defined and assessed using a base of a minimum of 20 stations. A station is a piece of static fitness equipment and larger health and fitness centres with more stations are generally able to make a more attractive offer to both members and casual users. They can provide a valuable way to assist people of all ages, ethnicities and abilities to introduce physical exercise into their daily lives with the obvious concomitant benefits to health, fitness and wellbeing.

The current state of the UK fitness industry is complex with a variety of providers including private (ranging from low cost operators to the high end market), trusts, schools and local authority operators amongst others. Within the UK private fitness market has continued to grow steadily over the last 12 months with an estimated increase of 6% in the number of members. Further, all regions have seen an increase in the number of clubs, members and total market value but only four have seen an increase in average membership fees over the last 12 months.

There are 319 low cost clubs within the private sector, a 24% (62 clubs) increase over the last 12 months. Their membership has passed the one million mark for the first time (41% increase) and the total market value has increased by 43% to under just £300 million. The low cost sector continues to be the fastest growing segment of the private health and fitness market.

There are now 25 private low cost chains across the UK with Pure Gym the market leaders for the third year in a row with 92 clubs, having opened 27 in the last 12 months.

### 5.1: Supply

#### *Quantity*

Research undertaken for the assessment report identifies 41 health and fitness suites in Sunderland, of which 29 offer 20 stations or more. There is a total of 2,070 stations within the identified fitness suites (those over 20 stations), of which 797 of which are available, at some level, to the community.

Figure 5.1 shows that the areas of higher deprivation are relatively well serviced by health and fitness equipment, apart from an area in the South of the City, to the east of Hetton-Le-Hole.

In addition to those listed below, there are 11 health and fitness facilities containing fewer than 20 stations within the City. Five of these are available to the public and therefore may accommodate some localised demand. For the purpose of this report, however, these facilities are discounted because of their scale.

Figure 5.1: Health & Fitness suites (20+ stations) in Sunderland over indices of deprivation

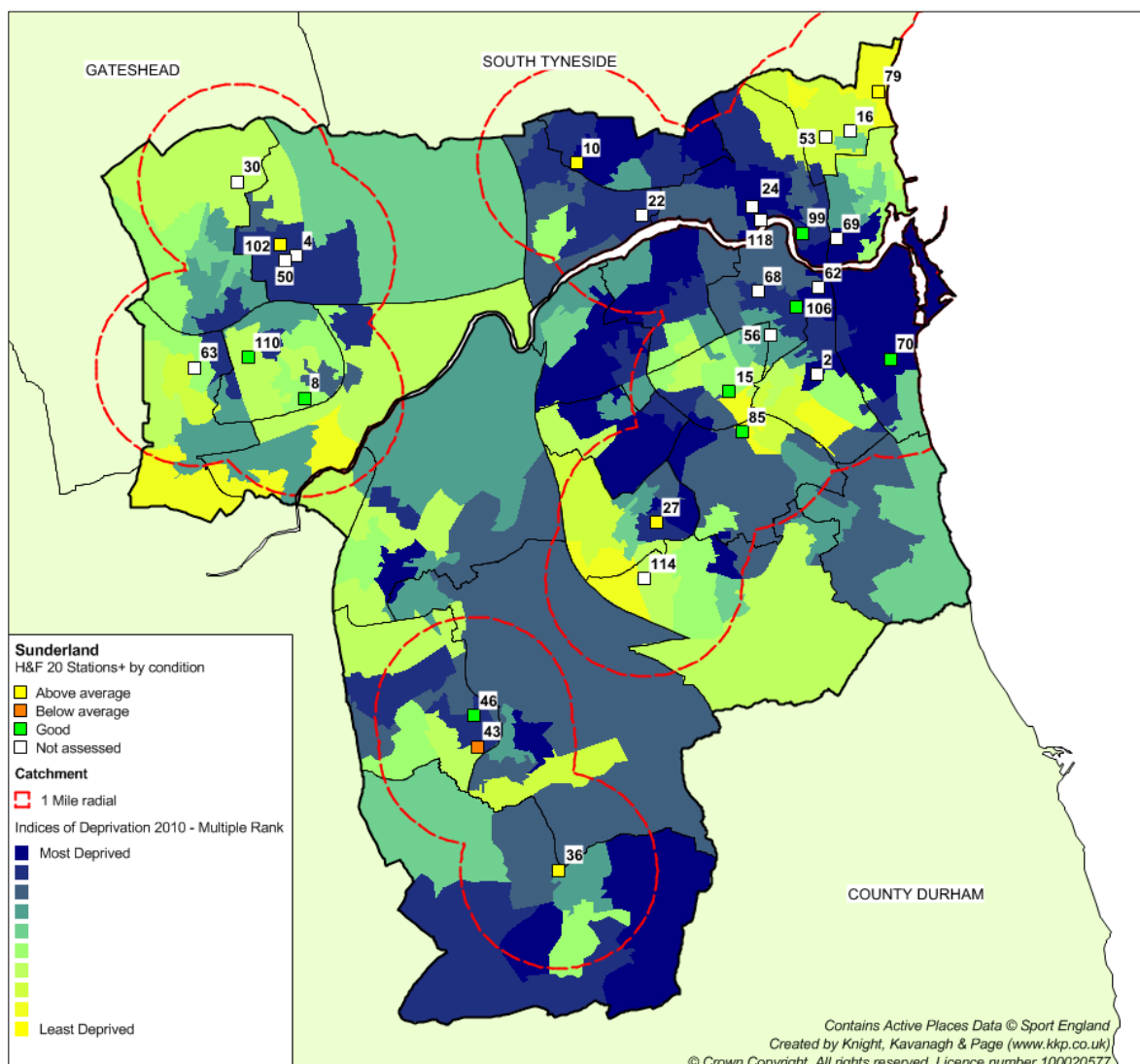


Table 5.1: Health and fitness suites in Sunderland

ID	Active Places Site Name	Stations	Comm. use
1	Academy 360	15	No
2	Ashbrooke Sports Club	26	No
4	Atlas Gym	37	No
8	Biddick Academy	26	Yes
10	Bunny Hill Wellness Centre	50	Yes
12	Castle View Sports Centre	15	Yes
15	City Of Sunderland College	25	Yes
16	Club Zest Ladies Leisure	34	No
18	Community North Sports Complex	17	Yes
22	DW Sports Fitness	100	No
24	Elite Health And Fitness	51	No
27	Farrington Community Academy	30	Yes
28	Fitness 2000	20	No
30	George Washington Leisure Club	23	No
36	Hetton Community Pool And Wellness Centre	48	Yes

ID	Active Places Site Name	Stations	Comm. use
37	Hetton Comprehensive School	16	No
43	Houghton Kepier Sports College	20	Yes
46	Houghton Sports Complex	45	Yes
50	Ladyb Fitness	39	No
51	Lambton Street Youth Centre	17	Yes
53	Marine House Fitness Centre	130	No
55	Marriott Leisure Club	15	No
56	Mayfair Health Club	77	No
61	O'Briens Fitness Centre	15	No
62	Olympia Fitness & Beauty Centre	60	No
63	Oxclose Community Academy	27	No
68	Premier Health & Fitness Centre	37	No
69	Pure Gym	220	No
70	Raich Carter Sports Centre	100	Yes
77	Sandhill Sports Centre	14	Yes
79	Seaburn Centre	36	Yes
85	Silksworth Community Pool Tennis & Wellness Centre	143	Yes
99	Sunderland Aquatic Centre	140	Yes
101	The Venerable Bede C of E Academy	12	No
102	The Washington Millennium Centre	34	Yes
105	Thornhill School	15	Yes
106	University Of Sunderland City Space	80	No
110	Washington Leisure Centre	100	Yes
111	Washington Secondary School	8	Yes
114	Wearside Health and Racquets Club	95	No
118	Xercise4less	400	No
<b>Total</b>	<b>(not including those of less than 20 stations)</b>	<b>2,070</b>	

## Quality

### Site assessments

In total, 21 of the 41 health and fitness suites were visited and assessed. The majority of sites not assessed are commercially run facilities where a registered membership is required. The health and fitness sector in Sunderland is developing with the recent opening of a new 400 station facility in Sunderland North and extensions presently being planned/undertaken by Everyone Active at:

- ◀ The Aquatics Centre.
- ◀ Silksworth Tennis and Wellness Centre.
- ◀ Raich Carter Leisure Centre.

This will increase the number of stations by approximately 200. (This has been accounted for in this assessment as they are due to all be open by Autumn 2015). The quality across the whole sector from budget to luxury is generally high with 21 facilities assessed as follows:

- ◀ Academy 360
- ◀ Biddick Academy
- ◀ Bunny Hill Wellness Centre
- ◀ Castle View Sports Centre



- ◀ City of Sunderland College
- ◀ Hetton Pool & Wellness Centre
- ◀ Houghton Kepier Sports College
- ◀ Raich Carter Sports Centre
- ◀ Sandhill Sports Centre
- ◀ Silksworth Pool Tennis & Wellness Centre
- ◀ The Venerable Bede C of E Academy
- ◀ University Of Sunderland City Space
- ◀ Washington Secondary School
- ◀ Farrington Community Academy
- ◀ Hetton Comprehensive School
- ◀ Houghton Sports Complex
- ◀ Seaburn Centre
- ◀ Sunderland Aquatic Centre
- ◀ Thornhill School
- ◀ Washington Leisure Centre
- ◀ Washington Millennium Centre

Site visits were carried out by KKP and assessors were accompanied by staff including facility managers and teaching staff. These visits provide an overall quality scoring and look for investment which has been undertaken. The assessments highlighted that there are no facilities with a quality rating of poor within Sunderland. Facilities were assessed as follows:

*Table 5.2 Quality rating of health and fitness suites in Sunderland*

Quality rating of assessed health and fitness suites				
Good	Above average	Below average	Poor	Not assessed
8	8	5	0	19

The investment in Raich Carter, Silksworth Tennis and Wellness Centre and the Sunderland Aquatic Centre will lead to both an increase in stations and improved facility quality. There will also be additional flexible studio spaces at these three sites.

*Table 5.3: Health and fitness suites in Sunderland with a quality*

Ref	Active Places Site Name	Stations	Quality
1	Academy 360	15	Below average
8	Biddick Academy	26	Good
10	Bunny Hill Wellness Centre	50	Above average
12	Castle View Sports Centre	15	Above average
15	City of Sunderland College	25	Good
27	Farrington Community Academy	30	Above average
36	Hetton Community Pool And Wellness Centre	48	Above average
37	Hetton Comprehensive School	16	Above average
43	Houghton Kepier Sports College	20	Below average
46	Houghton Sports Complex	45	Good
70	Raich Carter Sports Centre	100	Good
77	Sandhill Sports Centre	14	Below average
79	Seaburn Centre	36	Above average
85	Silksworth Community Pool Tennis & Wellness Centre	143	Good
99	Sunderland Aquatic Centre	140	Good
101	The Venerable Bede C of E Academy	12	Above average
102	Washington Millennium Centre	34	Above average
105	Thornhill School	15	Below average
106	University of Sunderland City Space	80	Good
110	Washington Leisure Centre	100	Good

Ref	Active Places Site Name	Stations	Quality
111	Washington Secondary School	8	Below average

The facilities which were recorded as below average are all school based facilities; these tend to have fewer stations than local authority or commercially managed facilities.

### ***Accessibility and availability***

The Sport England classification of access type defines registered membership use facilities as being publicly accessible. For health and fitness suites, this generally means a monthly membership fee which can vary hugely. Whilst an expensive monthly fee does not generally enable public or community access in the truest sense (the top end cost can be as much as £130.00 per month with £75.00 joining fee in Sunderland), budget health and fitness providers offer membership from as little as £10.99 a month (as is the case at the recently opened 400 station fitness facility, Wessington Way in Sunderland North).

Sunderland's residents have a relatively wide choice of facilities that allow both casual users and membership only facilities. Sunderland University facilities are for the sole use of students and staff and there are some private clubs which only allow members to use the facilities.

The following 13 health and fitness suites are considered to be accessible to the wider community; they contain 797 stations.

- |   |                                    |
|---|------------------------------------|
| ◀ Biddick Academy                             | ◀ Houghton Sports Complex          |
| ◀ Bunny Hill Fitness Centre                   | ◀ Raich Carter Sports Centre       |
| ◀ City of Sunderland College                  | ◀ Seaburn Centre                   |
| ◀ Farrington Community Association            | ◀ Sunderland Aquatic Centre        |
| ◀ Hetton Community Pool and Wellness Centre   | ◀ Washington Leisure Centre        |
| ◀ Silksworth Pool, Tennis and Wellness Centre | ◀ The Washington Millennium Centre |
| ◀ Houghton Kepier Sports College              |                                    |

Most of the available health and fitness suites have extensive opening hours with daytime access to fitness suites.

## 5.2: Demand

Health and fitness via exercising in a gym or class environment is a highly popular form of exercise across Sunderland, appealing to men and women across a wide range of age groups.

Sport England APS 8 identifies 29,900 people currently participating in 'keep fit and gym', which at 12.6% of the adult Sunderland population is above the 'UK penetration rates' of 12% (% of the overall population that regularly access a gym facility). It also indicates that a further 16,800 (7.1%) state that they would like to begin participating in the future, indicating a potential future growth in demand.

To identify the adequacy of the quantity of provision a demand calculation based on an assumption that 'UK penetration rates' will increase slightly in the future is applied. Population increases are also factored in to enable a calculation of whether current supply will meet future demand.

*Table 5.4: UK penetration rates for health and fitness suites in Sunderland*

	Current (2012)	Future (2024)	Future (2037)
Adult population	275,743	278,503	280,453
UK penetration rate	12%	13%	14%
Number of potential members	33,089	36,205	39,263
Number of visits per week (1.75/member)	57,905	63,358	68,701
% of visits in peak time	65	65	65
No. of visits in peak time (equivalent to no. of stations required i.e. no. of visits/39 weeks*65%)	965	1,055	1,145

The model identifies 1.75 visits per week by members and 65% usage during 39 weeks of the year.

According to UK penetration rates there is a current need for 965 stations across Sunderland, which is expected to grow to 1,055 stations by 2024 and to 1,145 stations by 2037. When comparing the number of community accessible stations currently available (797) the market appears to have slightly under the amount required. It is necessary, however, to factor in comfort and accessibility of stations at peak periods, in particular. Even allowing for a comfort factor which is double the current demand, there appears to be sufficient stations (2,070) within Sunderland to cater for anticipated demand.

## 5.3: Supply and demand analysis

Health and fitness facilities are seen as an important facet and have been a very successful addition to sports centres over the past three decades; the income derived from them helps to offset the cost/underpin the viability of other aspects of leisure provision, especially swimming.

Sunderland has a total of 2,070 fitness stations across 21 sites, of which 797 are considered to be housed at facilities accessible to the whole community. The recent opening of a 400 station facility combined with the investment by Everyone Active (which has been taken into consideration in this assessment) suggests that Sunderland has a surfeit of stations, based on 'UK penetration rates'.

This suggests that different providers are chasing a finite market, which may lead to a need to reduce prices over a period of time. It remains to be seen whether these facilities provide opportunity for those in the most disadvantaged areas. It is likely that the level of local competition will ensure that the quality of the offer remains high.

## 5.4 Health and fitness suites

Dance studios have become a very important element of the wider health, fitness and conditioning market. They vary in size, shape, quality of changing, access to sprung wooden floors etc. There appears to have been an increase in the numbers of people accessing fitness classes as identified in the fitness and conditioning element of Sport England's Active People Survey. The type of activity offered also varies massively between more passive classes such as Pilates and Yoga to the more active dance, step and Zumba sessions.

Figure 5.2: Dance studios in Sunderland

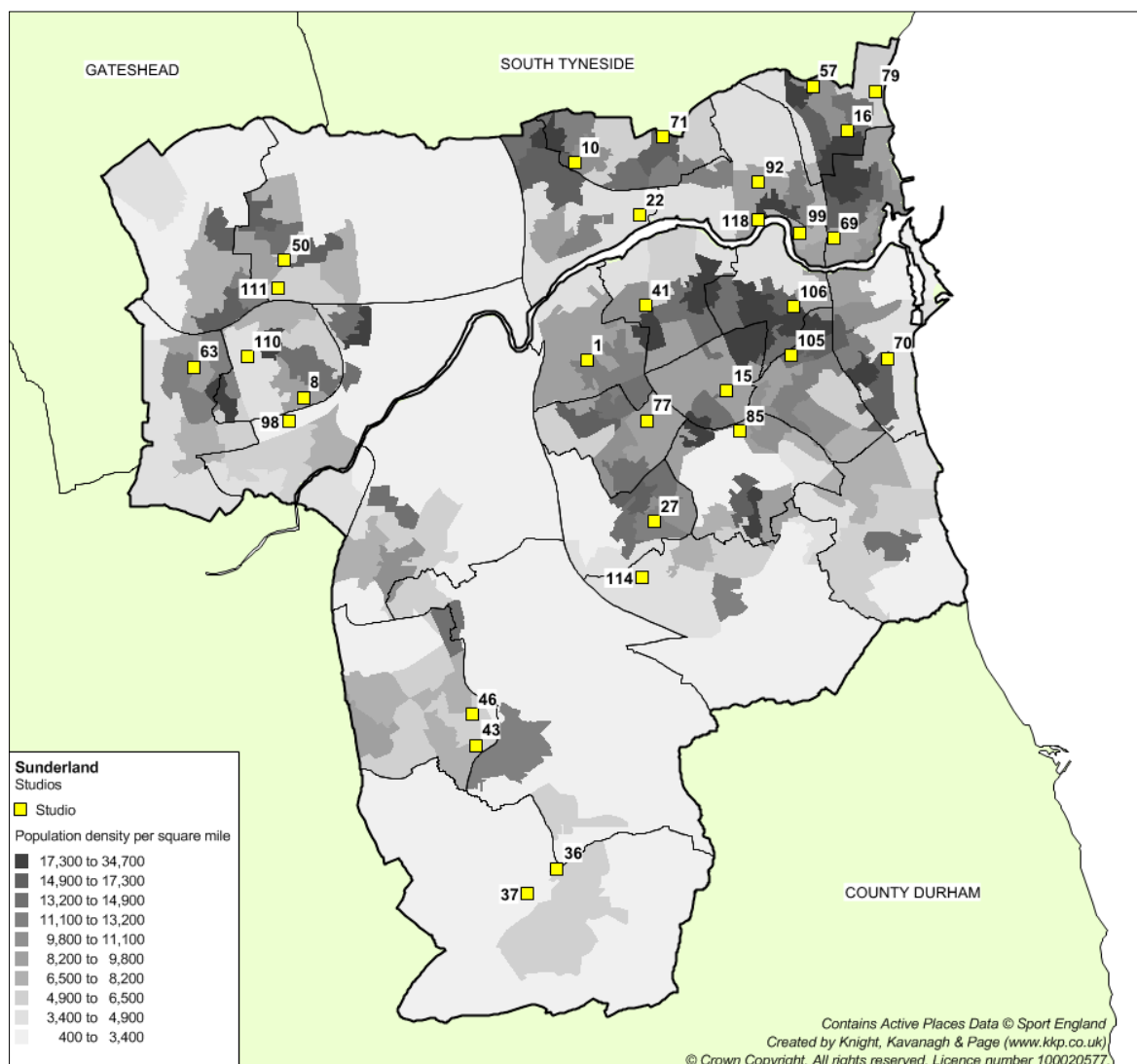


Table 5.5: Studios in Sunderland with condition

ID	Active Places Site Name	Number	Condition
1	Academy 360	2	Good
8	Biddick Academy	2	Good
10	Bunny Hill Wellness Centre	1	Above average
15	City Of Sunderland College	3	Good
16	Club Zest Ladies Leisure	1	Not assessed

ID	Active Places Site Name	Number	Condition
22	DW Sports Fitness	2	Not assessed
27	Farringdon Community Academy	2	Above average
36	Hetton Community Pool And Wellness Centre	1	Good
37	Hetton Comprehensive School	1	Above average
41	Highfield Community Primary School	1	Not assessed
43	Houghton Kepier Sports College	1	Below average
46	Houghton Sports Complex	2	Above average
50	Ladyb Fitness	1	Not assessed
57	Monkwearmouth School Sports Centre	2	Below average
63	Oxclose Community Academy	2	Not assessed
69	Pure Gym	1	Not assessed
70	Raich Carter Sports Centre	1	Good
71	Red House Academy	1	Good
77	Sandhill Sports Centre	1	Above average
79	Seaburn Centre	1	Above average
85	Silksworth Community Pool, Tennis & Wellness Centre	1	Above Average
92	Southwick Community Primary School	1	Good
98	St Robert Of Newminster School	1	Good
99	Sunderland Aquatic Centre	2	Good
105	Thornhill School	1	Above average
106	University Of Sunderland City Space	2	Good
110	Washington Leisure Centre	1	Good
111	Washington Secondary School	1	Good
114	Wearside Health & Racquets Club	2	Not assessed
118	Xercise4less	1	Not assessed

Figure 5.2.1 and Table 5.5 identify 49 studios based at 30 different sites throughout Sunderland. The majority are situated in areas of higher population density. It is assumed that studios at the commercially operated facilities are generally above average or of good quality. Only three facilities are considered below average; both to be found at school sites.

Fitness and conditioning is considered to be one the fifth most popular activity in Sunderland (according to APS 8). This suggests that 4.7% of the adult population takes part in this activity which is below the regional and national averages of 6.9% and 6.7% respectively.

Many studios are owned and operated by private companies and, in some instances, individuals. Some are located on premises as part of a wider leisure offer, some are located on premises that do not offer other leisure provision and others are stand-alone facilities.

## 5.5 Summary of key facts and issues

- ◀ There are 41 health and fitness suites of 20 or more stations within Sunderland, 13 of which are considered to have pay and play community use, providing a total of 797 stations.
- ◀ There are, however, over 2,000 stations available throughout the City,
- ◀ The more densely populated areas of Sunderland are seemingly well catered for in terms of the number of health and fitness suites available, whilst more sparsely populated areas also generally have access to nearby facilities.

- ◀ The majority of facilities assessed were rated as good (8) or above average (8). Those considered below average were mainly found on education sites.
- ◀ Although there are many privately provided facilities, Everyone Active, on behalf of the Council manages eight health and fitness suites and it is important that these facilities remain affordable and accessible to the wider community. The number of stations managed by Everyone Active is 692 (approximately one third of all stations available in Sunderland).
- ◀ There is a relatively wide choice of facilities and a variety of costs for all potential users in Sunderland.
- ◀ The effect of the investment on the health and fitness market remains to be seen but it will still be necessary to ensure that those who can benefit most from the facilities will have access to them (i.e. it is important to get the sedentary, active and the least active more active).
- ◀ There are 49 studios based at 30 different sites; there is no a national or regional standard to which this can be compared.
- ◀ It is not uncommon to find that smaller studios open and close and change hands relatively frequently.
- ◀ Studios offer an important part of the wider health and fitness offer and are particularly important in attracting hard to reach groups.
- ◀ The more densely populated areas of Sunderland are seemingly well catered for in terms of the number of studios. Many of the facilities reportedly attract local residents.
- ◀ The condition of most of the studios is noted as above average or good.
- ◀ Fitness and conditioning is considered to be the fifth highest participation activity in Sunderland (4.7%). These levels are lower than the regional and national averages which are over 6%.
- ◀ Studios can play a really important part linking to the wider health agenda, such as the links between the PCT and Everyone Active at the Bunnyhill Wellness Centre.
- ◀ Due to the disparate nature of the management of studios, it will be difficult to co-ordinate the sport and physical activity offer within them. It is nonetheless important that they are considered and used to engage the hard to reach groups, in particular, and help ensure that sedentary get active and the least active get more active.



## SECTION 6: MEMBERSHIP DATA ANALYSIS

In order to determine the reach and significance of specific facilities we analysed raw data provided by Everyone Active on users of facilities across Sunderland. This enables us to identify the home location of all registered users over a four week period (and is based on c.1,200 units of data supplied by Everyone Active). This usage relates to health and fitness members that have activated their membership card over the analysis period.

Figure 6.1 indicates the wide area that members travel to use all the facilities from both outside and inside the local authority. Patterns of travel can be discerned from the map with the majority of members utilising the facilities closest to them.

*Figure 6.1: All Everyone Active members over a four week period*

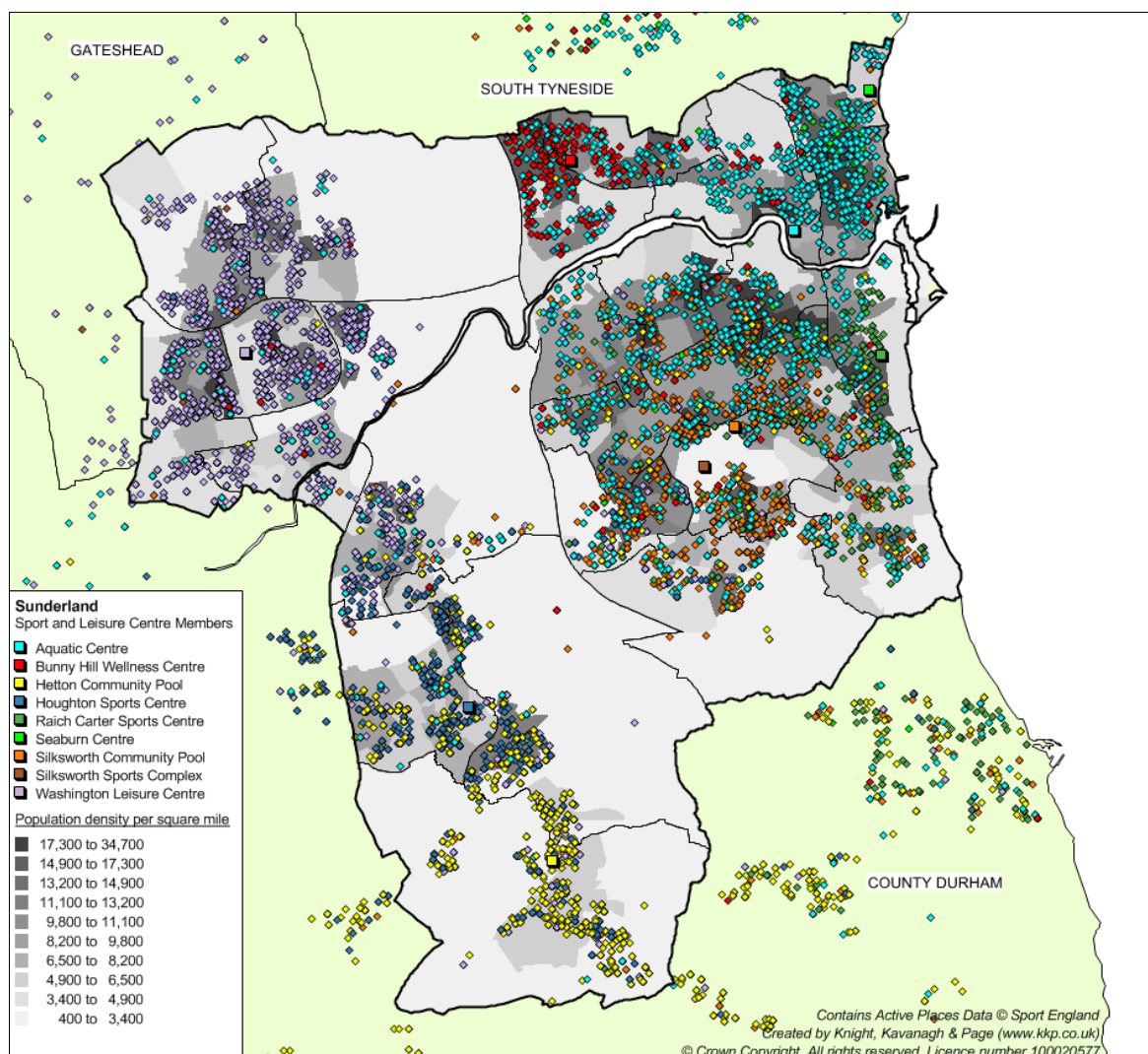


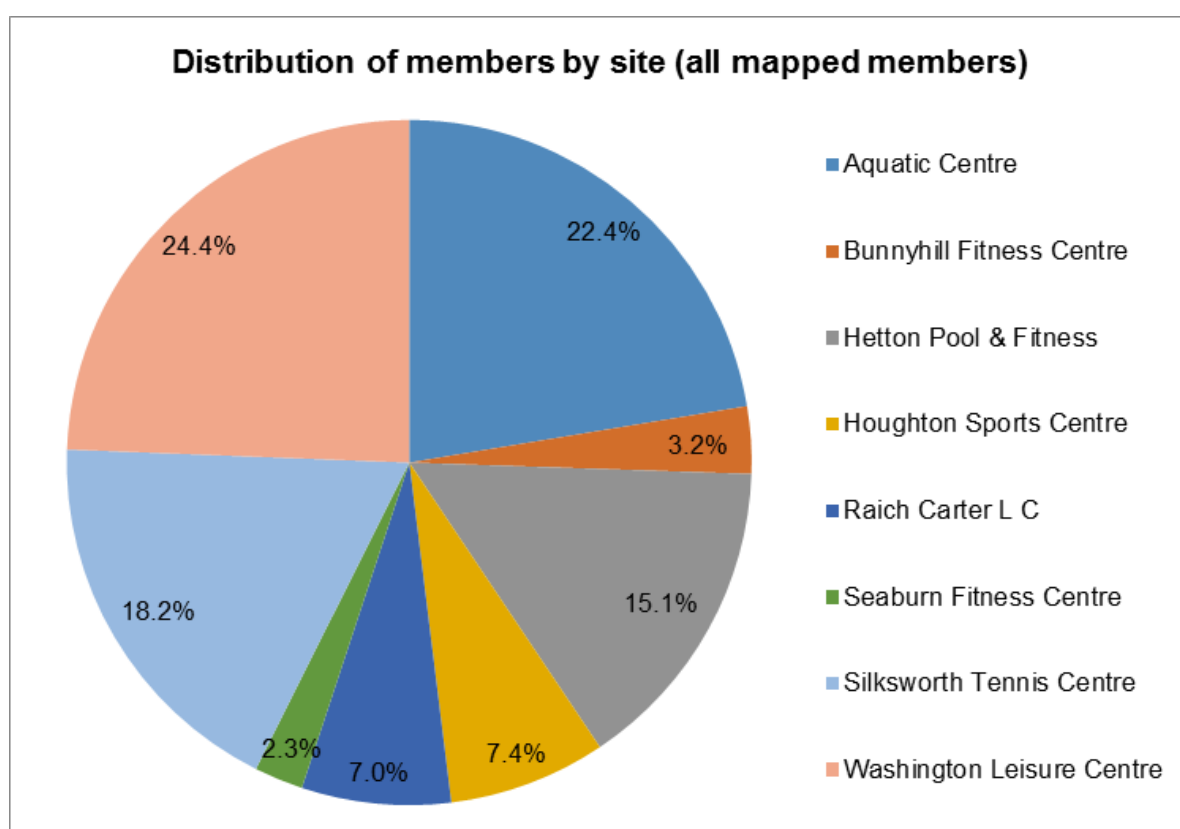


Table 6.1: Percentage share of Everyone Active membership (one month's data)

Site	Within Sunderland	Outwith Sunderland	Total
Aquatic Centre	22.2%	23.6%	22.4%
Bunnyhill Fitness Centre	3.3%	2.4%	3.2%
Hetton Pool & Fitness	12.0%	36.8%	15.1%
Houghton Sports Centre	7.7%	5.3%	7.4%
Raich Carter L C	6.5%	10.8%	7.0%
Seaburn Fitness Centre	2.1%	4.1%	2.3%
Silksworth Tennis Centre	19.9%	6.2%	18.2%
Washington Leisure Centre	26.3%	10.7%	24.4%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

Table 6.1 indicates that the highest number of members are based at Washington Leisure Centre (24.4%) followed by the Aquatics Centre (22.4%) and Silksworth Tennis and Wellbeing Centre (18.2%). Washington Leisure Centre has recently opened (June 2015). There is significant investment in health and fitness currently being undertaken at Silksworth the Aquatic Centre and Raich Carter Leisure Centre (all of which may have affected the current level of activity in the centres).

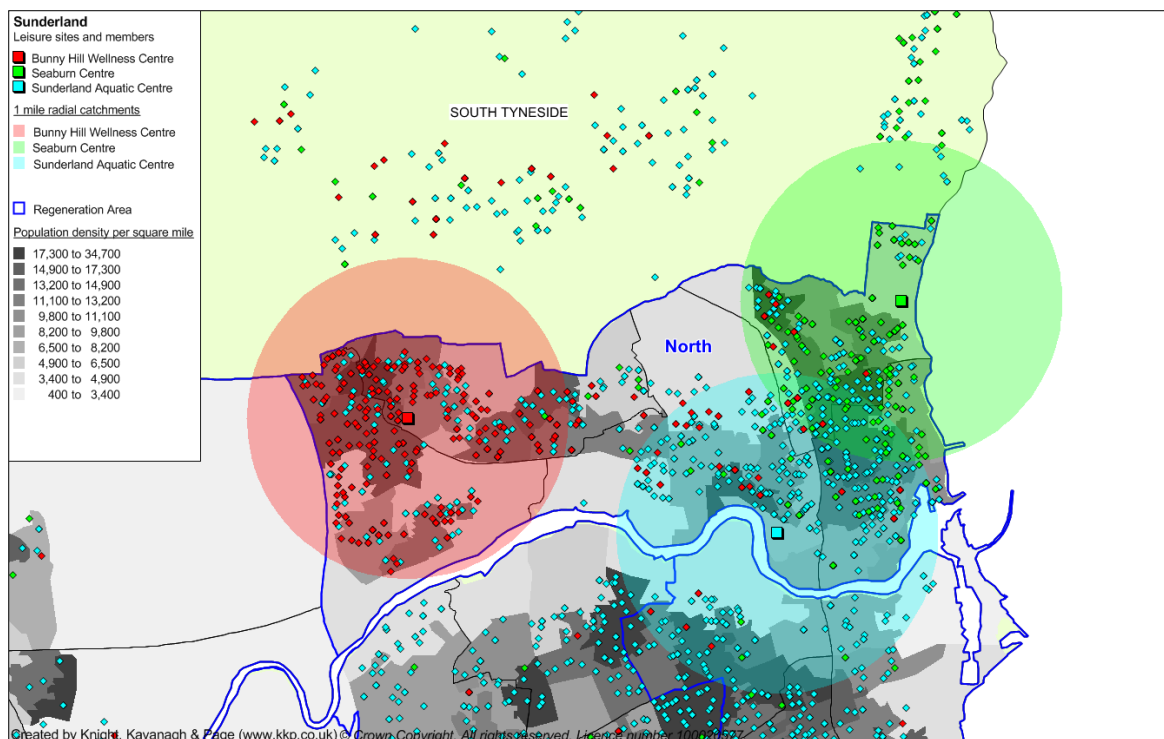
Figure 6.2: chart to indicate percentage share of Sunderland membership



## Membership data for facilities in Sunderland North

The three facilities, managed by Everyone Active, located in Sunderland North, are Sunderland Aquatics Centre, Seaburn Centre and Bunnywell Fitness Centre. The combined membership of these equates to 27.9% of the membership within Sunderland. The current spread of the membership can be seen in Figure 7.3.

*Figure 6.3: Membership data for three facilities in Sunderland North with 20 minute radial catchments*



As identified above Sunderland Aquatics Centre has 22.6% of the membership of the total facilities. Over one fifth of its members (23%) reside within one mile of the facility. Of those, c.33% live in areas of higher deprivation using the bottom 20% percentile of IMD. Just over one third of members (36.2%) are residents of Sunderland, suggesting that the facility is able to attract members from further afield and its relative proximity to the local authority border.

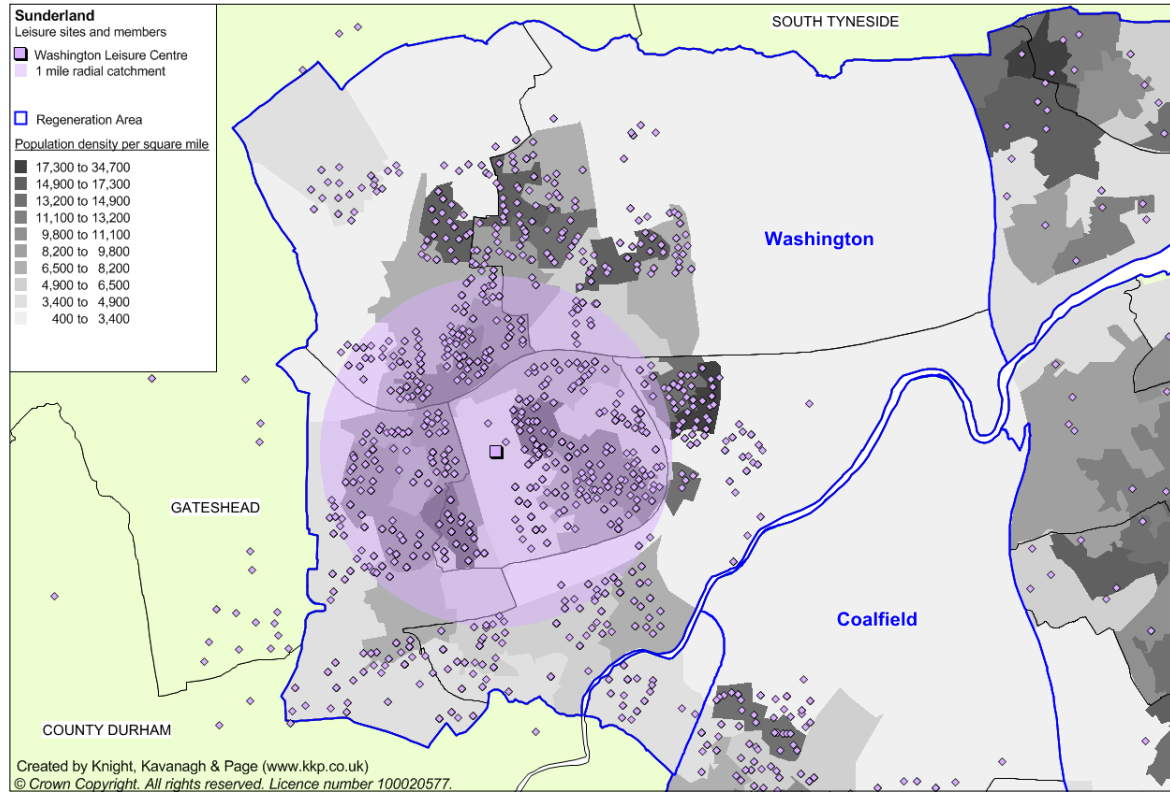
Bunnyhill Fitness and Wellness Centre has the second fewest members with 3.2% of the overall total. Of these, three quarters (74%) live within one mile of the facility indicating its local importance. Of those nearly two thirds (63.5%) live in areas of higher deprivation using the bottom 20% percentile of IMD. Just under three fifths of its members (58.3%) are residents of Sunderland.

Approximately two thirds of Seaburn Centre members live outside Sunderland. It does, however, have a good local membership with 61% being within the one mile radial catchment. None of those members are live in areas of higher deprivation using the bottom 20% percentile of IMD.

## Membership data for facilities in Washington

One facility managed and operated by Everyone Active in the Washington regeneration area. This is a brand new facility (opened 2015), it is still relatively difficult to access, with limited parking (due to construction works on site).

Figure 6.4 Membership data for the New Washington Leisure Centre



Washington Leisure Centre has the most members of any local authority owned sites in Sunderland with 24.4% of the overall total. Of these nearly half (47%) live within one mile radial catchment of the facility indicating its local importance.

Its importance is further evidenced by the fact that nearly one quarter of these members (23.5%) reside in areas of higher deprivation using the bottom 20% percentile of IMD.

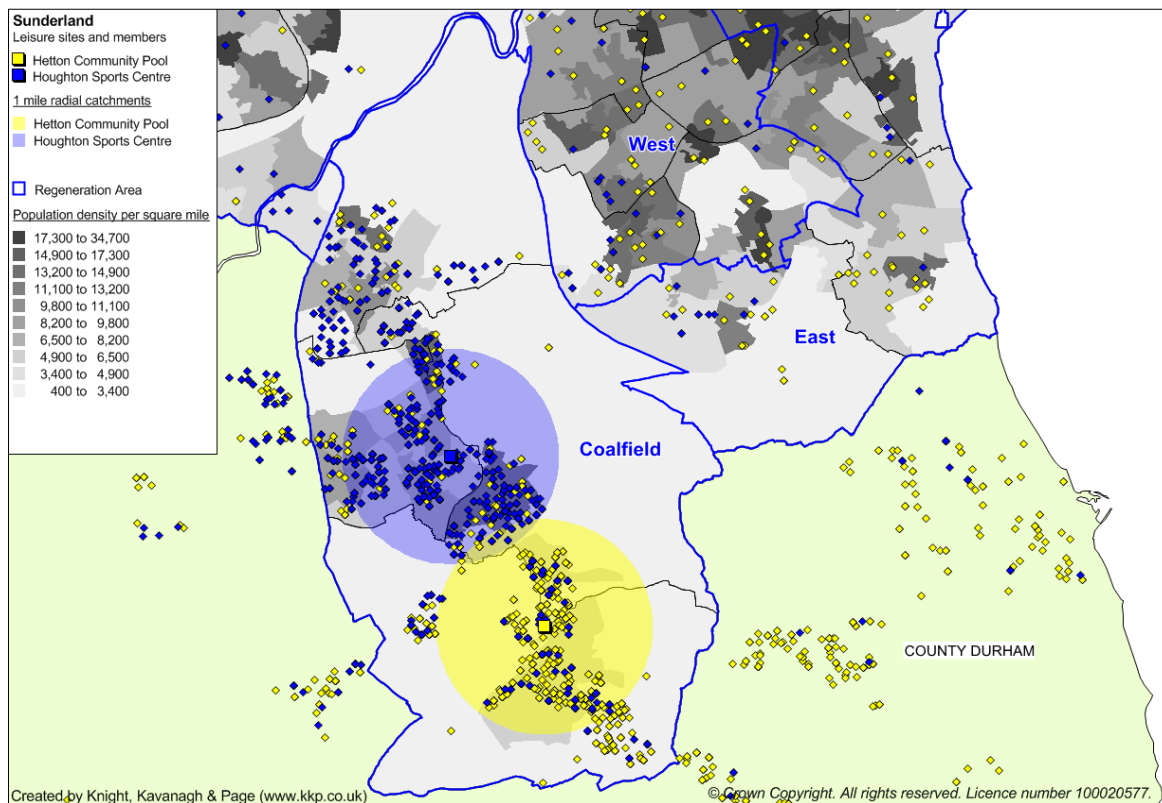
## Membership data for facilities in Coalfield

Two facilities are managed and operated by Everyone Active in the Coalfield Regeneration area, Hetton Swimming & Fitness Centre and Houghton Sports Centre. Between them they offer a wide range of facilities. Membership for the two equates to 22.5% of the overall membership of facilities managed by Everyone Active in Sunderland.

Hetton Pool and Fitness Centre has 15% of the Everyone Active members in Sunderland. Three quarters of its membership live outside of the Authority. Figure 4.4 clearly indicates that many travel from County Durham to use the facility. It is also an important local facility with 40% of members who live in Sunderland, being within one mile radial catchment of the facility. Just over 30% of its Sunderland resident members live in areas of higher deprivation using the bottom 20% percentile of IMD.

Houghton Sports Centre has 7.4% of the overall membership of Everyone Active facilities in Sunderland. Of those who live in Sunderland, nearly 60% are resident within a one mile radial catchment of the facility.

*Figure 6.5: Membership data for Hetton Pool & Fitness Centre and Houghton Sports Centre*



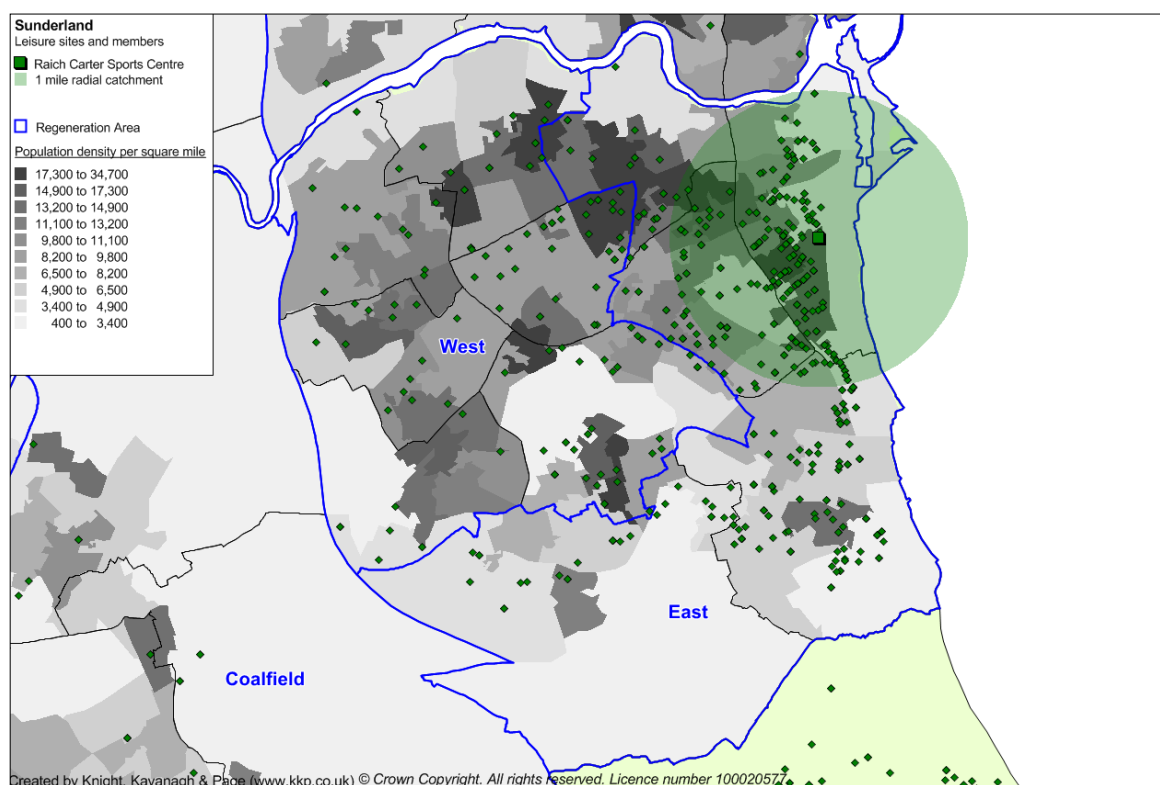
Just over one quarter of those (28.3%) who live in Sunderland live in areas of higher deprivation using the bottom 20% percentile of IMD.

## Membership data for facilities in Sunderland East

There is one facility managed and operated by Everyone Active in the Sunderland East Regeneration area, Raich Carter Leisure Centre. It is currently undergoing significant building work with the extension of the health and fitness offer. It accounts for 7.0% of all memberships of facilities managed by Everyone Active in Sunderland. It has a larger membership who reside outside of the City than within, which is perhaps surprising given its location. This suggests that many of its members may be people who work in Sunderland but do not necessarily live within the City.

Of the membership recorded within Sunderland, nearly two fifths (39%) of members reside within one mile of the facility making it locally accessible. A significant proportion of these (70%) live in areas of higher deprivation using the bottom 20% percentile of IMD.

Figure 6.6: Membership data for Raich Carter Leisure Centre





## Membership data for facilities in Sunderland West

There is one main facility managed and operated by Everyone Active in the Sunderland West Regeneration area, Silksworth Tennis and Wellness Centre. Its membership makes up nearly one fifth (18.2%) of all the membership across the Everyone Active managed venues in the City. It is currently undergoing significant building works designed to extend and improve its health and fitness offer; this will result in an increase from c.50 to over 140 stations as well as providing two new studios.

Silksworth Tennis and Wellness Centre has c. 3,000 members living within Sunderland, of which 12% live within one mile of the facility (indicating a reliance on transport to get to the facility). None of the people in this 12% reside in areas of higher deprivation using the bottom 20% percentile of IMD. Although over one fifth (21.3%) of its members from within Sunderland do live within the bottom 20% percentile using IMD.

The extra building work at Silksworth Tennis and Wellness Centre adds to the ski slope and other outdoor facilities at the site, which will enable it to become more of a leisure destination over time.

Figure 6.7: Membership data for Silksworth Tennis and Wellness Centre

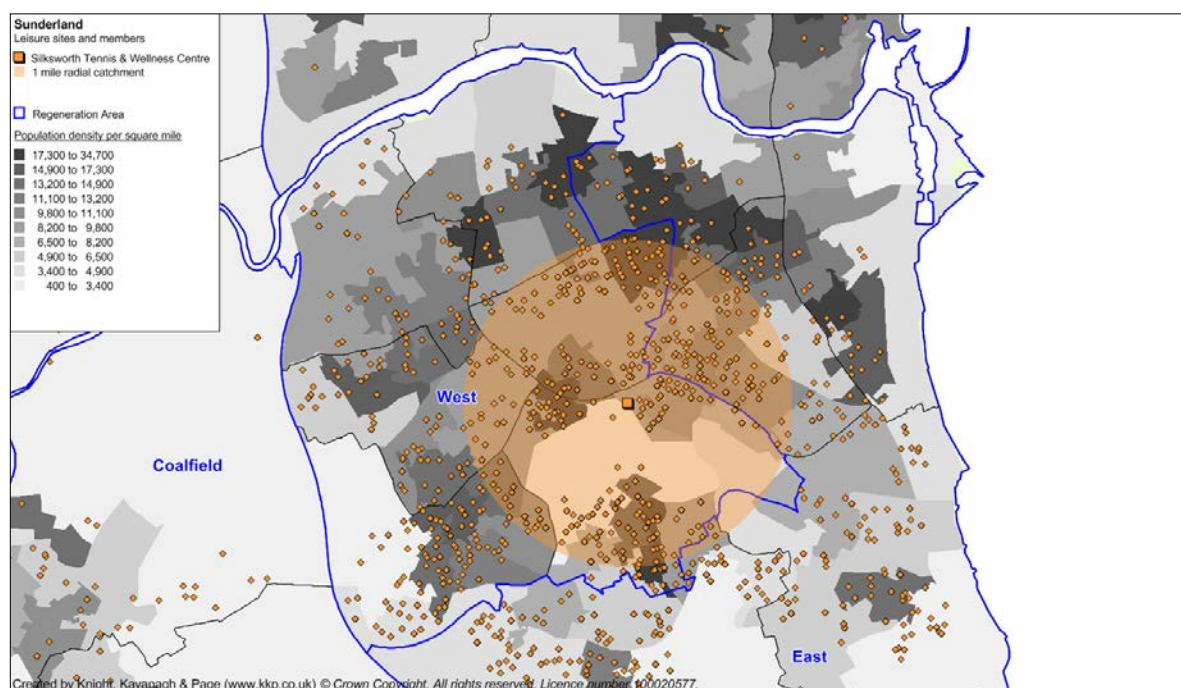


Figure 6.8 (overleaf) indicates that membership at facilities broadly reflects the population with regard to IMD with more members in Sunderland residing in the bottom 30% of deprivation compared with all members.

Figure 6.8: All members IMD analysis compared to Sunderland

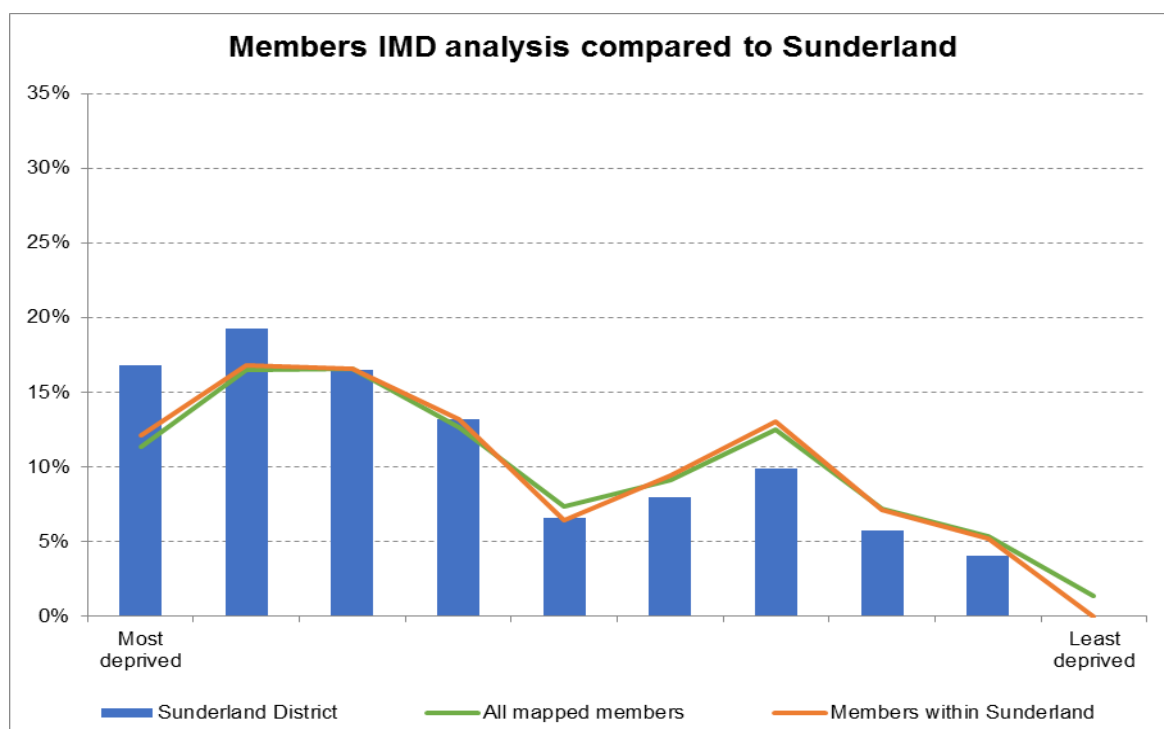
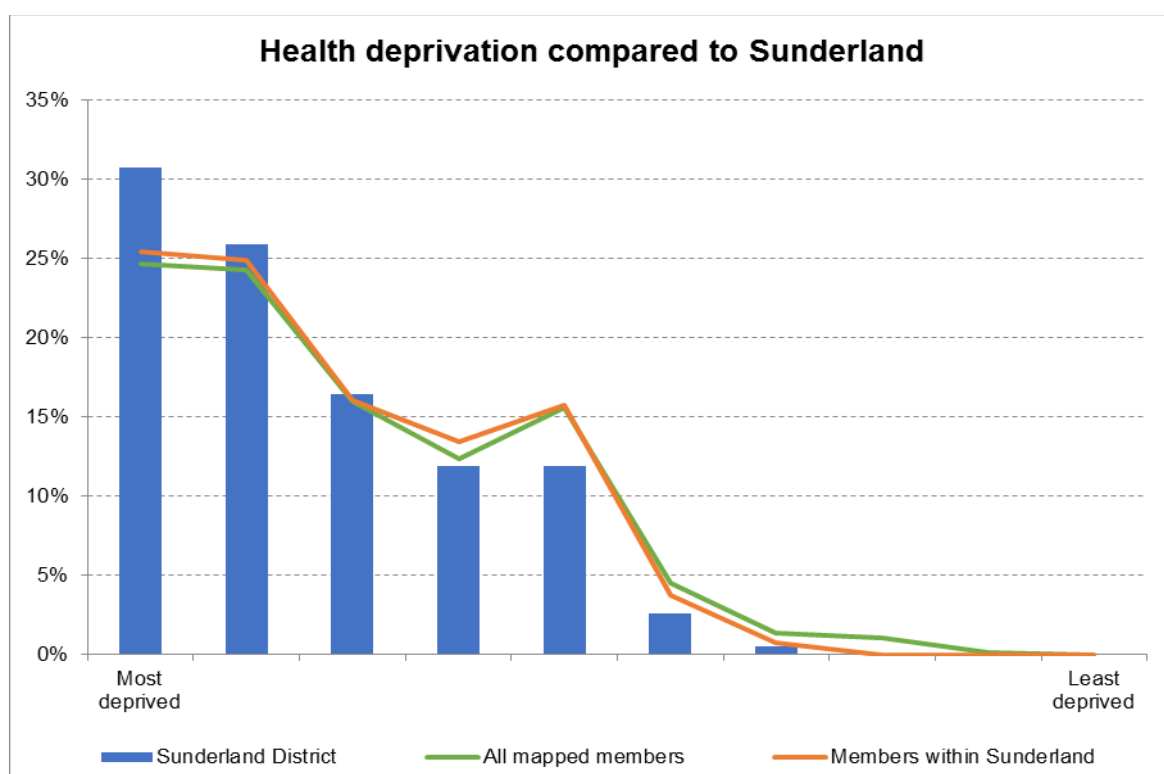


Figure 6.9: All members Heath Deprivation analysis compared to Sunderland





A key driver for SCC is to ensure that community sports facilities serve the needs of all residents and contribute to tackling wider health inequalities and well-being focus of the Council. As such we have analysed the users at each facility (all users and Sunderland residents) based on the health ranking of their postcode.

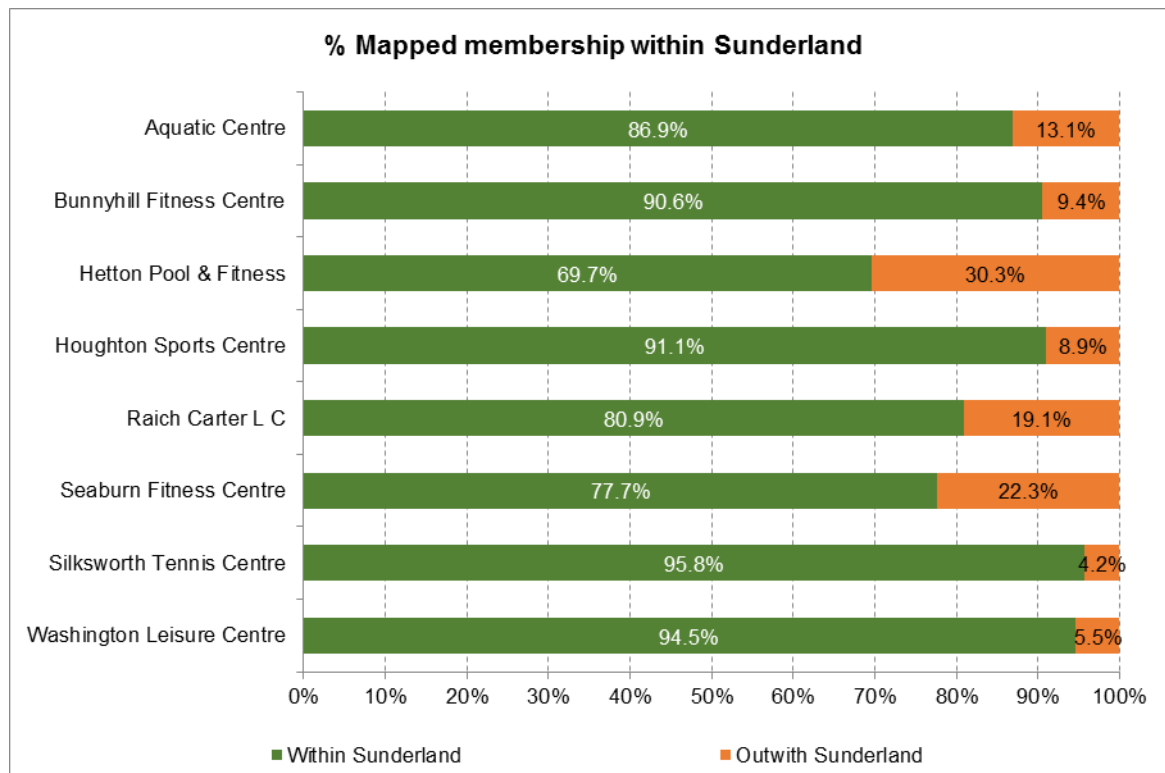
The analysis indicates that a significant proportion of people within the most 'health' deprived communities do access facilities across the City. This suggests that facilities are generally well located and that programmes and access are generally good. That is not to say that access cannot be improved and the recent investment in health and fitness facilities is an opportunity to increase accessibility still further.

### Usage of facilities by Sunderland and non-Sunderland residents

Figure 6.10 indicates the usage of facilities by residents and non-residents Sunderland. Washington Leisure Centre has the highest reported number of members closely followed by Sunderland Aquatics Centre. The importance of Washington is amplified by the high proportion of users which come from within the City; the Aquatics Centre, however has more usage from outside the City (13.1%).

Hetton Leisure Centre and Seaburn Fitness Centre have the highest proportion of members from outside the City, reflecting Seaburn's proximity to the local authority boundary and the potential of Hetton to draw in from a wider rural area. It is also interesting to note that nearly one fifth of members at Raich Carter are from outside the local authority as it is not situated particularly close to the local authority boundary.

Figure 6.10: Pictorial representation of membership Sunderland facilities



## Summary

- ◆ Membership of health and fitness facilities is spread throughout the leisure facilities in Sunderland. Nearly two thirds of membership is catered for by the three facilities of Washington Leisure Centre, the Aquatics Centre and Silksworth Tennis and Wellness Centre.
- ◆ The data for the Aquatics centre indicates that over one fifth of its members reside within one mile of the facility. Of those c.33% live in areas of high deprivation. Just over one third of members are residents of Sunderland, suggesting that the facility is able to attract members from further afield, which is important in the context of a development in this area of the city.
- ◆ Hetton Pool and Fitness Centre has the highest percentage of non-Sunderland's resident members at 30.3 % (although this does not translate to the highest number of members).
- ◆ All sites have a high percentage of members within a 20 minute radial catchment, apart from the Silksworth Tennis and Wellness Centre.
- ◆ Current investment in health and fitness facilities will lead to an increase of c200 health and fitness stations at Everyone Active facilities, as well as increased studio space. It is expected that it will lead to increases in participation and membership at all the facilities. It will be necessary to ensure that these facilities remain fully accessible to people in their local communities.
- ◆ No data has been evaluated in respect of the age group of the current membership. Everyone Active needs to be cognisant of the ageing profile of the population and ensure that programmes of activity and classes are relevant.

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### SECTION 7: SQUASH COURTS

England Squash & Racketball (ESR) is the NGB for squash and racquetball at national and regional level. Both games are played on squash courts.

#### 7.1 Supply

Squash has over the past 30 years seen a considerable decline in participation, with the result that many courts have been either demolished, abandoned or converted into alternative facilities, such as spin studios, soft play centre or fitness suites. It is estimated that, in England, 4,500 courts remain.

##### *Quantity*

Across Sunderland assessment report research identifies seven courts at 3 sites. Only one site offers pay and play facilities (Washington Leisure Centre) whilst the other two sites operate as private members clubs. Washington is a new facility and offers high quality glass back squash facilities. The distribution of courts across Sunderland is illustrated in Figure 7.1 overleaf.

*Table 7.1 Key: Sunderland squash*

Map ID	Active Places Site Name	Courts	Comm. Use	Condition	Changing Condition
2	Ashbrooke Sports Club	3	No	Not assessed	Not assessed
110	Washington Leisure Centre	2	Yes	Good	Good
114	Wearside Health & Racquets Club	2	No	Not assessed	Not assessed

#### 7.2: Supply

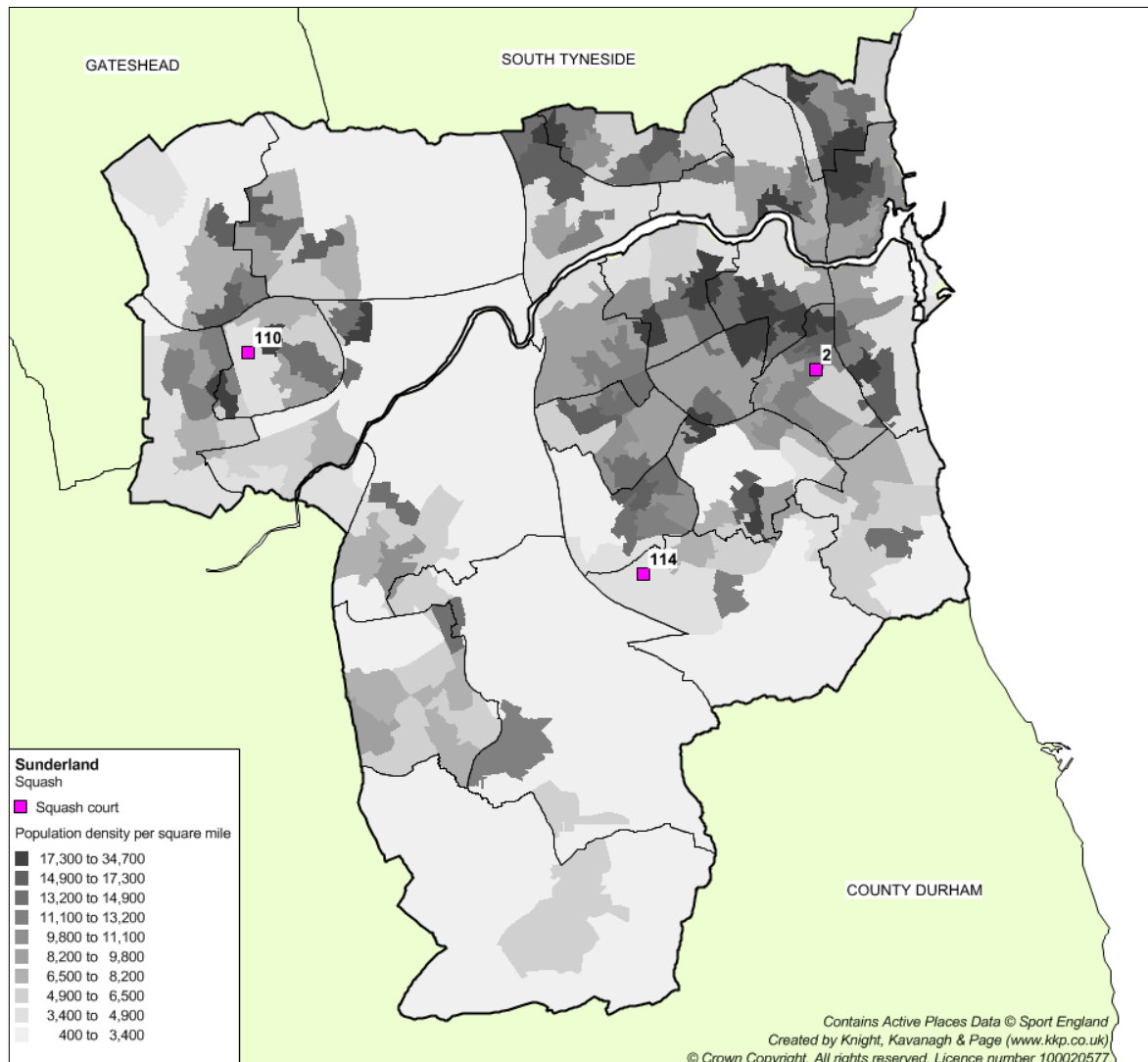
The supply of courts within Sunderland is currently able to meet demand and there are reportedly some un-booked time slots (peak and off-peak) within Washington Leisure Centre. Within private clubs there is evidence of continuing demand for courts and clubs running squash ladders and teams playing in inter club leagues.

#### 7.3 Consultation

England Squash and Racquetball is focused on rebuilding the popularity of squash although NGB resources are limited. Sunderland is not a governing body priority area for development in the North East. It has been identified as a Tier 3 Sport for Tyne and Wear Sport which indicates that it is not a priority but core coaching services are available if required

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Figure 7.1: Squash Facilities in Sunderland



## 7.4 Summary of key facts and issues

- ◀ Squash is played at a mix of public and private venues in Sunderland.
- ◀ The distribution of courts is relatively small with only seven courts in the City, of which two are in the public sector and five in the private sector.
- ◀ The squash courts are relatively evenly distributed with availability in three of the five regeneration areas including Washington, South Sunderland. They are located in areas of relatively high population density.
- ◀ It seems unlikely that squash will return to the levels of popularity enjoyed during the 1970/80s. It is, thus, predicted to continue to be a minority sport.
- ◀ Squash facilities in Sunderland appears to be are meeting demand and there is capacity for the game to grow within the existing infrastructure should participation trends in squash and racketball change.
- ◀ Court space offers a level of flexibility and the space can be used for table tennis and a range of exercise and fitness classes.

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### SECTION 8: INDOOR BOWLS

The three forms of bowls that can be played indoors that require a different venue are flat green, crown green and carpet mat (short and long mat)

Indoor flat green bowls requires a standard bowling green; a flat area 34-40 metres long divided into playing areas called rinks. The number of these varies, depending on the width of the green.

Crown green bowls requires a standard crown green, artificial grass (carpeted) area of approximately 38m square which is crowned i.e. higher in the centre than round the perimeter. Indoor crown greens are relatively rare – substantially less common than those provided for flat green bowls.

Carpet mat bowls is played on a rectangular carpet (45 x 6 feet) that is rolled out. It can be accommodated in any indoor space large enough to accommodate the mats which come in different lengths. Carpet mat bowls tends to be played at a recreational level whereas indoor flat and crown green bowls tend to be more competitive and organised around inter-club competitions and leagues.

An indoor bowling centre typically comprises a single flat green with a number of rinks and ancillary accommodation such as changing rooms, lounge/bar, viewing area, kitchen, office/meeting rooms and stores. In addition they usually have designated car parking. The size of the ancillary accommodation normally varies according to the number of rinks available.

A successful indoor bowls centre requires a combination of the right location, design, and financial and general management. Sport England<sup>7</sup> guidelines on catchment for indoor bowls centres are set out to be interpreted in the light of local circumstances:

- ◀ Assume the majority of users will live locally and not travel more than 20 minutes.
- ◀ Assume 90% of users will travel by car, with the remainder by foot.
- ◀ As a guide, demand is calculated as one rink per 14,000-17,000 of total population.
- ◀ A six-rink green, therefore, is required for a population of 85,000-100,000. This will be dependent upon the population profile of the area.
- ◀ The number of rinks required can be related to the estimated number of members, assume 80-100 members per rink.

The English Bowls Association (EIBA) is the NGB for bowls. Its stated objectives are:

- ◀ A growth in participation across the adult population in local communities. Targeted work to increase female participation.
- ◀ A growth in participation in the 14-25 age range, plus working with primary schools (Year 3 & 4 – age 7 to 9).
- ◀ The provision of an excellent sporting experience for new and existing participants.
- ◀ A growth in indoor bowls participation by people who have disabilities.

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<sup>7</sup> Sport England Design Guidance Note Indoor Bowls 2005

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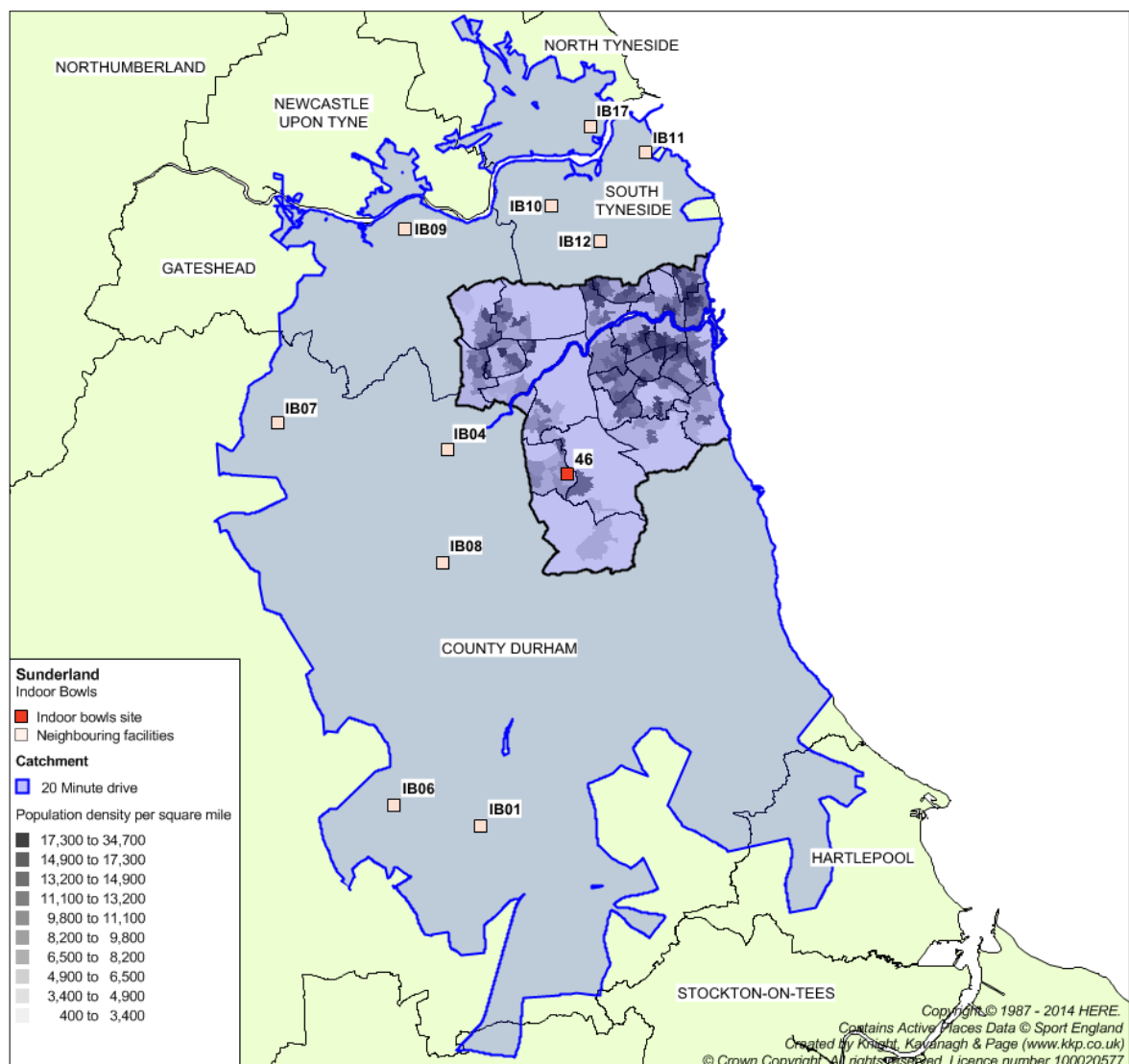
## 8.1 Supply

### Quantity

At the time of analysis there is one indoor flat green bowling facility in Sunderland situated at Houghton Leisure Centre in South Sunderland. This is part of a wider range of sports halls and other multi use activity halls within the centre.

The Houghton facility has 6 rinks which according to Sport England guidance can accommodate between 480 – 600 members. The current 468 membership of Houghton (as of 2014) suggests there is spare capacity and is actually below the Sport England recommended levels (up to 600). In addition, the Houghton club reported that over 100 new members joined in 2013 following the closure of the Crowtree rinks.

*Figure 9.1: Houghton and neighbouring indoor bowls facilities within 20 minute drive time*



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Table 8.2 Indoor bowls facilities within 20 minutes drive time of Houghton-Le-Spring

Map ID	Active Places Site Name	Rinks	Access Type	Ownership	Local Authority
IB01	Ferryhill Community Hub	4	Pay and Play	Local Authority	County Durham
IB04	Park View Comm. Association	3	Pay and Play	Other	County Durham
IB06	Spennymoor Indoor Bowls Club	3	Sports Club/ Comm. Assoc	Sports Club	County Durham
IB07	Stanley Indoor Bowls Club	8	Pay and Play	Sports Club	County Durham
IB08	Durham Indoor Bowls Club	8	Pay and Play	Commercial	County Durham
IB09	Gateshead Indoor Bowls Club	8	Pay and Play	Local Authority	Gateshead
IB10	Primrose Community Association	2	Registered Membership use	Local Authority	South Tyneside
IB11	South Shields Indoor Bowls Club	8	Pay and Play	Sports Club	South Tyneside
IB12	Boldon Community Association	3	Pay and Play	Community school	South Tyneside
IB17	Parks Leisure Centre	8	Pay and Play	Local Authority	North Tyneside

The facilities at Houghton Leisure Centre are managed by Everyone Active as part of a joint venture with SCC, with the arrangement beginning on 1<sup>st</sup> June 2015.

### Quality

The crown green bowls facilities at Houghton Leisure Centre are above average condition although other elements of the site, including some changing could be considered to be below average.

### Accessibility

All Sunderland residents reside within 20 minute drive time of Houghton Leisure Centre and its indoor bowls facility. Further, Figure 8.1 indicates 10 more indoor bowls facilities within the catchment of Sunderland and it is estimated that it should take 20 minutes drive time to the nearest facility. These offer a further 59 rinks. Park View Community Association, Durham Indoor Bowls Club, Primrose Community Association and Boldon Community Association are all relatively close to the Sunderland border and with three of these offering pay and play opportunities there appears to be a good supply of indoor facilities in the wider area.

## 8.2 Demand

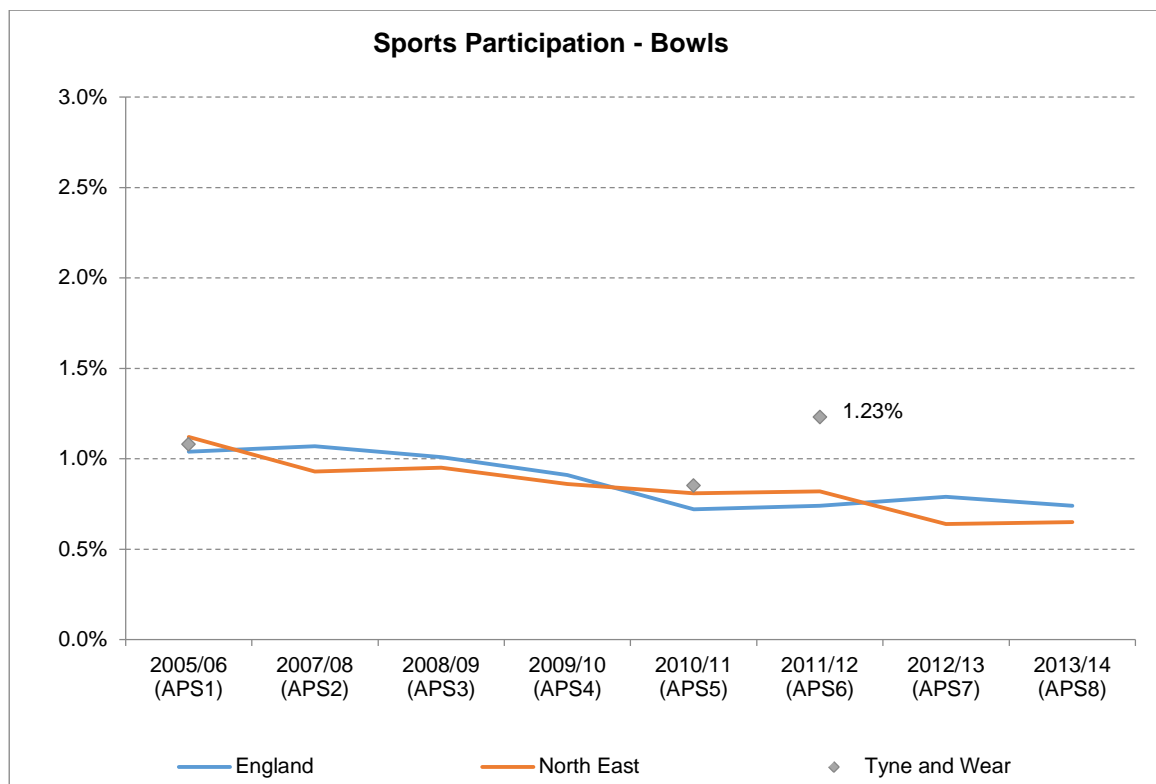
Bowls, in general, has seen a decline in demand nationally, which is reflected in Figure 8.1 below. Data is only available on a regional wide basis from Sport England's Active People Survey, due to the low numbers involved in the survey. Sunderland's Playing Pitch Strategy 2012 identified that outdoor bowls club membership showed that demand



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had generally decreased or remained constant over the previous three years and that current demand for bowling greens is being met by provision in Sunderland. The main indoor bowls club did not make itself available for consultation.

Figure 8.2: Map to show national demand



### 8.3 Summary of key facts and issues

- ◆ As in other areas of the country, all bowls formats (crown, flat and short mat), despite an aging population profile are experiencing a decline in popularity.
- ◆ Opportunities to participate in indoor crown green bowls are available at Houghton Leisure Centre within Sunderland and a further 10 rinks located within an estimated 20 minute drive time of Houghton-Le-Spring.
- ◆ No leisure manager, from across the City, indicated an unmet demand for carpet or short mat bowls in other venues.
- ◆ The closure of Crowtree in 2013 led to an increase in membership of up to 100 at the Houghton club, but it still reports having capacity to grow.
- ◆ Bowls is a particularly popular sport amongst older people. The older population (65+ years) is expected to increase substantially in Sunderland up until 2037.
- ◆ The projected increase in residents age 65+ is an opportunity to increase participation trends and demands amongst older people.

### SECTION 9: INDOOR TENNIS

The Lawn Tennis Association (LTA) is the NGB for all tennis provision within the UK and administers the sport at national and regional level. It uses two terms to describe indoor building types:

#### *Traditional*

A permanent structure made of traditional materials using traditional construction techniques. This commonly takes the form of steel or timber portal frame spanning the full length of the court (including run backs) clad in a material to suit local conditions e.g. metal cladding, brickwork or timber boarding.

#### *Non traditional*

A permanent or non-permanent structure made of non-traditional materials using non-traditional construction techniques. Three types of structure fall into this category:

- ✦ Air supported structures (air halls)
- ✦ Framed fabric structures
- ✦ Tensile structures

### 9.1 Supply

#### **Quantity**

There are two facilities in Sunderland with indoor tennis provision. These are outlined below. One is a commercial operator (Wearside Health and Rackets Club) and the other is operated by Everyone Active on behalf of SCC (Silksworth indoor Tennis and Wellness Centre)

#### **Quality**

The original site at Silksworth opened in 1988 and consisted of four indoor courts, ancillary changing and toilet facilities, office space and multi- activity room. In 1996, a further four courts-were added, making this a substantial tennis facility. There is good run off, distance between courts and good lighting. In addition, there are a further six outdoor courts. The facility has plenty of parking space and is currently undergoing significant investment in its health and fitness offer. The quality of the offer enables both national and international competitions to be held at the venue.

It is reported that there are the occasional leaks into the fabric of the building and onto a couple of courts but this has not resulted in cancellations.

All residents in Sunderland can currently access an indoor tennis facility within a 20 minute drive. The local road network facilitates a catchment area wider than just Sunderland residents. A 20 minute drive-time also covers much of County Durham and areas in Hartlepool, South Tyneside, North Tyneside, Newcastle and Gateshead.

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Figure 9.1: Tennis facilities in Sunderland with a 20 minute drive time from Silksworth

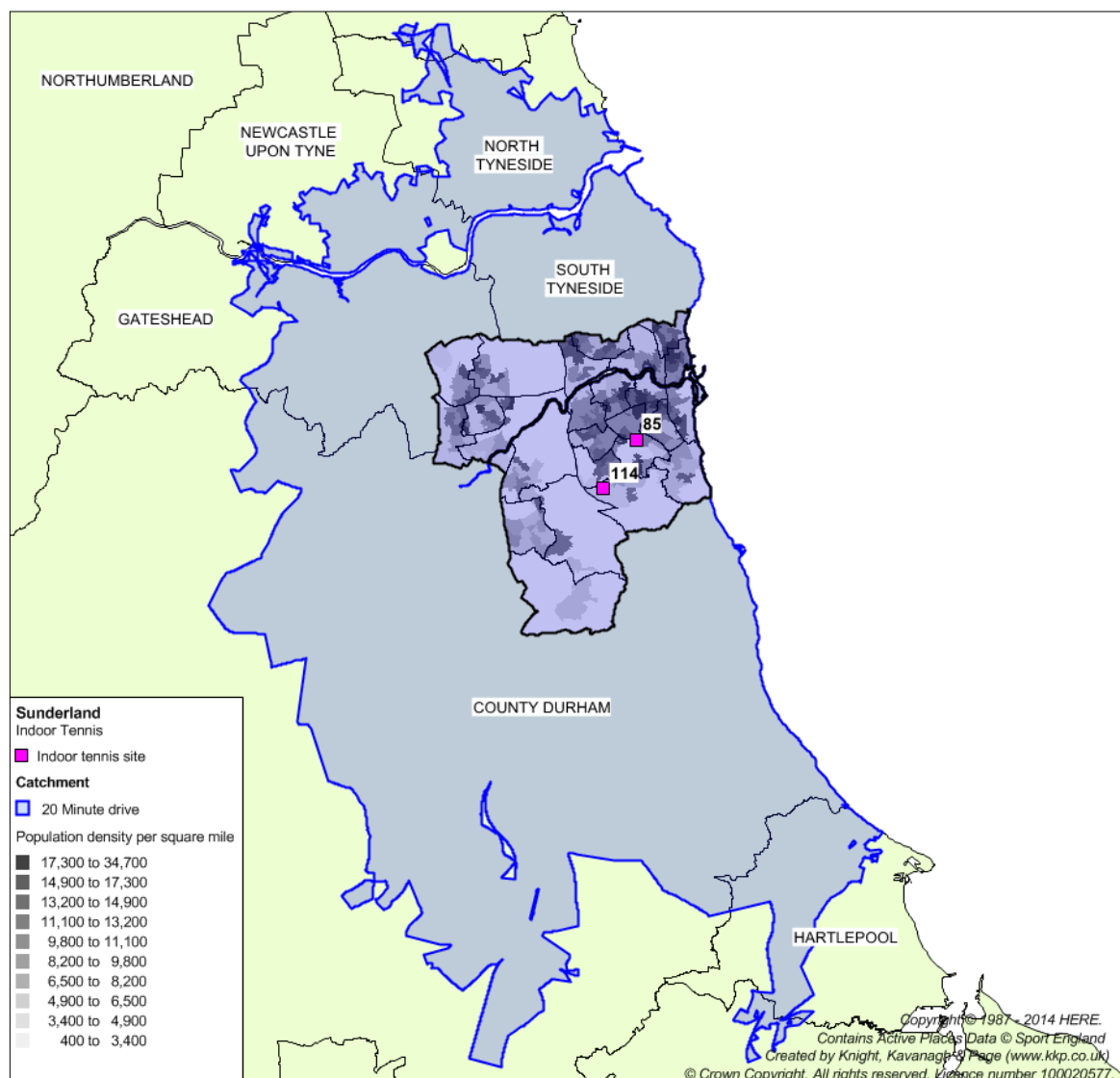


Table 9.1 Indoor tennis facilities in Sunderland

Map ID	Active Places Site Name	Courts	Comm. Use	Condition	Changing Condition
85	Silksworth Community Pool Tennis & Wellness Centre	6	Yes	Good	Above average
114	Wearside Health & Racquets Club	8	No	Not assessed	Not assessed
114	Wearside Health & Racquets Club	2	No	Not assessed	Not assessed

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## 9.2 Demand

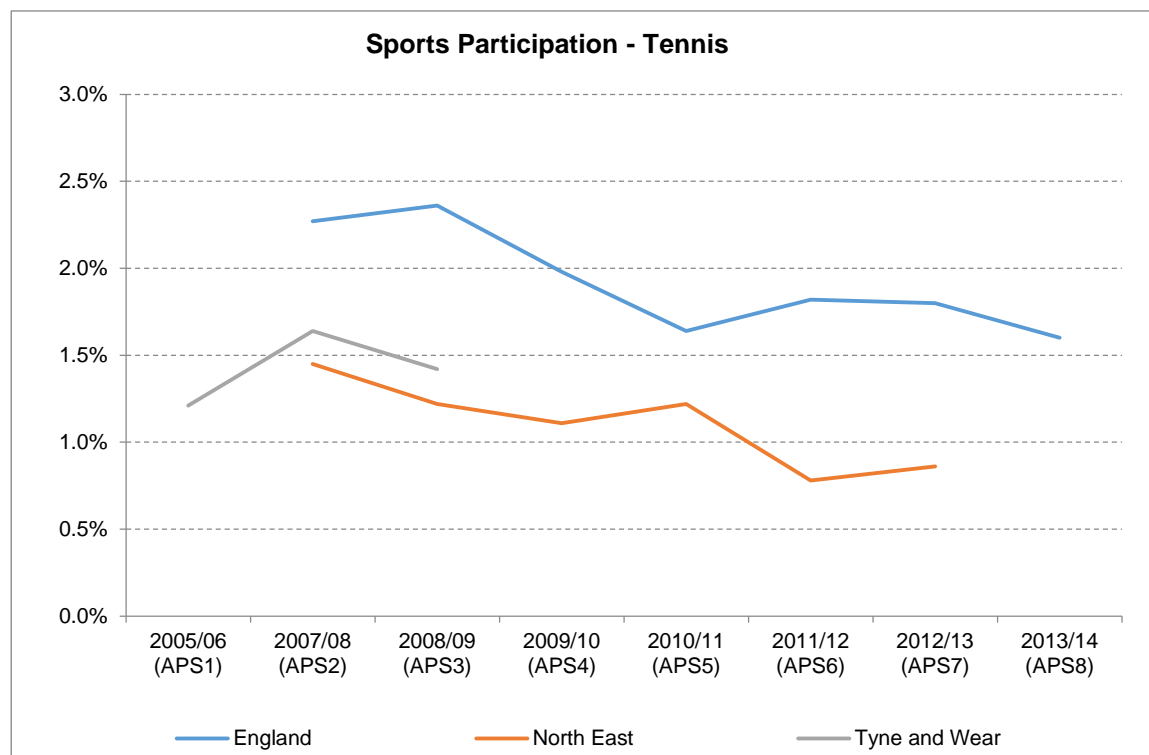
Sport England estimates that people will travel up to 30 minutes to a specialist facility such as an indoor tennis centre. Using a conservative estimate of 20 minutes' drive time, it is estimated that all of Sunderland's population lives within 20 minutes' drive of Silksworth. Further, it is estimated that up to 1,150,699 people live within the 20 minute drive catchment (using MYE 2013).

The site is, however, currently underutilised at off peak times and it is rare that all eight courts are used at the same time, apart from during competitions and when lessons are being delivered.

## 9.2 Demand

The number of people participating in tennis (indoor and outdoor) is 424,300 nationally according to the Active People Survey (APS) 7 which is up from 420,300 in APS 6. Data for tennis is generally only available for regional level due to the low numbers involved in APS responses. Nonetheless, it can be seen that there has been a general decline in the numbers taking part in tennis since 2006 (albeit with variations within the decline).

*Figure 9.2: Tennis participation in England and North East (Using APS data)*



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### 9.3 Consultation

Consultation at Silksworth indoor Tennis and Wellness centre indicates that:

- ◀ There has been a reduction of local authority funding into marketing and promotion of the centre over the past few years.
- ◀ There is and has been a significant and successful schools outreach programme.
- ◀ Up to 20 clubs use the facility throughout the year (especially in winter months). Use varies from (say) 1 court per week to 3 courts twice per week.
- ◀ Clubs travel up to 40 miles to use the facility. It is also well used by Sunderland, Durham and Newcastle universities. This is commensurate with figure 8.1 which shows estimated travel times to the facility.
- ◀ It is cheaper to hire than the Wearside Tennis and Racquets Centre but tends to aim at different market segments. It is important that prices remain competitive if it is to continue to attract Sunderland residents.
- ◀ Silksworth has extensive opening hours which include three days at 14 hours, two days at 15 hours and 20 hours at weekends.
- ◀ The site is currently undergoing significant investment in its health and fitness offer. The number of stations will rise to c. 145 (from its current level of 45). The current fitness room will be converted into dance studios.
- ◀ There are also a couple of meeting rooms and soft play area. Meeting rooms are used by the NHS for cardio rehab amongst other activities.

#### *Silksworth Tennis Club consultation*

There is one main club in the area (New Silksworth Tennis Club) based at the Silksworth Pool, Tennis & Leisure Centre. It currently has 70 members and has seen an increase in adult membership over the last three years with junior membership remaining much the same. Booking courts is not highlighted as an issue as the Club has exclusive access to three outdoor courts. It reports that indoor courts get booked up at peak times but this does not impact on its activities. An extensive programme of tennis also runs at the Wearside Health & Racquet Club (Virgin Active).

### 9.4 Summary of key facts and issues

- ◀ Supply of indoor tennis provision in Sunderland offers sufficient capacity to accommodate additional members and users at all venues.
- ◀ The private facilities are well used but can accommodate additional members.
- ◀ The Silksworth site has spare capacity at peak and off peak times, which could be better utilised.
- ◀ Customers travel significant distances to use the facility and with c. 20 clubs using the facility it is proving to be a popular venue.
- ◀ Silksworth is in good condition and appears to offer tennis to a different market than that offered by Wearside Health and Rackets Club.
- ◀ The investment and extension to the health and fitness offer may start to compete with the Wearside Club as the quality of the facility is significantly improved.

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### SECTION 10 SWOT ANALYSIS

Based upon audit and consultation findings the following SWOT analysis identifies key issues for discussion;

#### 10.1 Strengths

- ◆ SCC recognises the importance of its leisure facility stock to health and well-being and future planning needs. The current population is relatively stable and unlikely to increase significantly in the next 20 years.
- ◆ There is a wide range of sports facilities in the City including 30 indoor sports halls, one indoor bowls venue, squash courts, an eight court indoor tennis facility and extensive health and fitness facilities.
- ◆ The sports hall facilities include two 8-court halls and one 6-court hall, which allows city wide and regional events to be hosted.
- ◆ SCC has recently entered into a joint venture with Everyone Active to manage its leisure centres, which has brought investment into a number of facilities particularly the health and fitness provision.
- ◆ The recent investment and extension to facilities is mainly in extending the health and fitness and studio facilities within Raich Carter, Sunderland Aquatics Centre and Silksworth Tennis and Wellness Centre.
- ◆ SCC owned sports halls are generally in a good state of repair and the stock has been boosted by the recent opening of Washington Leisure Centre.
- ◆ Washington Leisure Centre has a specific trampoline facility which is well utilised.
- ◆ The membership data for all the facilities is relatively good and indicates that many are used by people from areas of high deprivation and who live within 20 minute radial walk catchment (data is only based on four weeks active membership).
- ◆ There appears to be more investment into small sided football cages (e.g. at Washington Leisure Centre) outside. If managed well, this can lead to a more varied programme indoors.
- ◆ The majority of accessible sports halls are spread across the City.
- ◆ Programming across the sports halls appears not to be completely dominated by indoor football with good programmes in gymnastics, trampolining and good pay and play opportunities at a number of facilities.
- ◆ There is a wide range of health and fitness suites distributed across the City, ranging from high quality/high priced spa facilities to the community accessible facilities at SCC facilities and the low budget options in Sunderland.
- ◆ The City has three sites which offer squash facilities. No latent demand for squash has been identified which cannot be accommodated in the current facilities.
- ◆ There is one indoor bowls facility which has managed to accommodate an increase of 100 new members in 2013 following the closure of Crowtree. The site is still not full to capacity although it does get busy at peak times.
- ◆ All residents live within 20 minute drive time of Houghton Indoor Bowls club and there is still some capacity to grow.
- ◆ Silksworth Tennis Centre offers a high quality regional facility with a well-developed outreach programme and a range of club usage.

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### 10.2: Weaknesses

- Everyone Active manages four of the sports halls sites in the City which renders its influence over the other halls as minimal.
- The amount of community use varies at all education sites, depending on the approach taken by individual schools to this (in some cases it is non-existent with some others only offering facilities to the community during term time and not during exams).
- Sport England's FPM indicates an undersupply of sports hall across the City of up to nine courts (not taking account of Raich Carter). The audit and subsequent analysis confirms an under supply mainly due to the lack of accessibility of facilities on education sites.
- NGBs, working through local clubs, indicate that there is insufficient supply of available sports hall space to cope with demand. This is limiting the development of a number of sports including netball, basketball and badminton. This demand is not isolated to any particular area within the City.
- The Seaburn Centre appears to be incongruous with its surrounding area and is likely to be closed within a five year period. It is highly unlikely that other leisure centres in the area will be able to cope with all the displacement of activity from this site.
- Monkwearmouth School Sport Centre is the closest facility to the Seaburn Centre and is considered below average quality and has limited accessibility (term time only). This has the ability to detrimentally affect participation.
- Given the fragmented nature of the management arrangements of the sports halls, no one organisation has taken, or appears likely to take, a lead on the programming of activity or access (and securing community use to schools) in the City. Even if they did, it is not certain that schools and academies will extend the use of facilities.
- Neighbouring local authorities do not help to ease the demand for indoor sports halls.
- There does not appear to be a cohesive sports development link between school sport, club development and community use of schools, for example. This is likely to deteriorate further with more schools potentially moving to academy status and operating independently.
- There does not appear to be any key co-ordination of community use of sports facilities across the City and in many cases operators are working within their own silo without overall leadership and direction.

### 10.3 Opportunities

- It is assumed that SCC in partnership with Everyone Active will be the strategic lead for sport in the City and ensure that key decision makers are brought into the strategic process moving forward.
- Investment by Everyone Active in additional, new health and fitness provision, gives it an opportunity to drive the health/well-being agenda at its facilities and drive up participation.
- Proposed development of the Beacon of Light by the Foundation provides an exciting opportunity for Sunderland. Its development has been identified as fundamental to the growth in participation in netball, badminton and basketball, in particular.
- All three of these sports are keen to utilise any such development to develop programmes of activity for current demand, increase the ability to drive participation forward for Sunderland residents and support a programme of events which will increase the profile of the specific sports locally and regionally.
- The proposed Beacon of Light will also be able to accommodate any displacement of activity, should the Seaburn Centre close
- There is the potential for developer contributions secured through s.106 or CIL planning obligations to support new/enhanced facilities, although growth is relatively small in the City.
- SCC has entered into a joint venture agreement with Everyone Active, which is aimed at ensuring the service is sustainable and financially robust.
- It is expected that Everyone Active will bring its expertise in the sector to help increase participation in a range of sports and that it will advocate and co-ordinate activity across the



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City.

- Everyone Active could also help extend the role that key schools and community facilities play in meeting the needs of key sports within certain communities. This may also enable some schools to offer more community use than they currently do.
- Links with health partners resulted in the development of the Bunnyhill Wellness Centre and it is important that more opportunities to work with the health sector are identified with relationships becoming more formalised. This is specifically relevant given the health challenges faced in the light of the current level of health deprivation in the City and the projected ageing population.

### 10.4: Threats

- The projected increase in ageing population for the City could put an increasing strain on the current stock of facilities at specific times. This is coming at a time when there will be a need for increasing Council efficiencies and cuts.
- The potential exists for further fragmentation of the community sport and physical activity offer across the City due to the increasing independence of schools (via academies and free schools) and further private investment in profit making activities (e.g. gyms).
- There is a threat that Everyone Active will pay lip service to the joint venture agreement and concentrate on those activities (and people) which provide a good financial return rather than concentrating on the more hard to reach groups.
- Closure of the Seaburn Centre, if not replaced, will reduce the opportunities and participation it currently offers to existing and potential new customers.
- The lack of joined up programming and sports development service, across the City, may lead to duplication of activity and/or gaps in provision of a full sport and leisure offer.
- The changing age profile of the City will put increased pressure on access to facilities particularly during the day.

### 10.5: Summary and strategic recommendations

The information below is a very brief summary of the key findings, which is followed by a number of strategic recommendations following the assessment of indoor built facilities across Sunderland.

The management of sports halls is diverse with schools, academies, Everyone Active and private operators all responsible for different facilities. Community use of schools and academies is variable with some organisations being very amenable to community use and others not so. There is currently unmet demand for sports halls across the City, particularly in the sports of badminton, netball, basketball and futsal. The projected increase in the age of the population suggests that programmes and opening times of facilities will need to ensure that the older population is included. This is difficult given the reliance on school facilities for provision across the City.

SCC's relationships with Everyone Active is in its infancy as a joint venture company and needs to be monitored carefully to ensure that it achieves pre-agreed targets with regard to inclusion within indoor built facilities. Residents will benefit from complementary programming and pricing at all facilities across the City. It is acknowledged that this amount of coordination takes time and effort and will need to be undertaken by a lead organisation (potentially Everyone Active).

Investment by Everyone Active at Raich Carter, the Aquatics Centre and Silksworth in the health and fitness offer should lead to a major increase in participation at these facilities.

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The health and fitness offer in the City is already very competitive and it will be incumbent on Everyone Active to ensure that it continues to attract people from hard to reach groups with a view to improving the health of residents and getting the inactive, active.

The data provided by Everyone Active to analyse usage is adequate, in that it can only refer to usage from the first four weeks of operation. Further analysis on the use of facilities by age and gender would also be useful.

The Foundation of Light is investigating the possibility of developing a 12 court sports hall on the Stadium site, adjacent to the Sunderland Aquatics Centre. There is currently insufficient supply of facilities for the level of demand found for a number of sports in Sunderland. Consultation with NGBs identifies the need for at least an eight court sports hall (with two sports indicating a need for a further 12 courts). Given this demand, the proposed closure of the Seaburn Centre will exacerbate the situation and it is unlikely that current sports operating from the site will be able to find appropriate facilities locally. Further, should Seaburn close there will also be a further need for appropriate space to hold and host larger sporting and cultural events.

The Houghton indoor bowls facility is accessible to all residents of Sunderland (using 20 minutes drive time) and has the potential to continue to contribute to the physical and social wellbeing of people from older age groups. The Club was unavailable for consultation but it is understood that it grew by c100 members in 2013 following the closure of Crowtree and that it has some capacity to grow.

The City has three facilities which offer squash courts, the newest of which are the two glass backed courts opened at Washington Leisure Centre. It is hoped that the new courts will add impetus to local activity and start to address the national decline in squash and racketball on a local level. There is also a need to support clubs locally to ensure improved business focus leading to increased sustainability.

Silksworth Indoor Tennis Centre is an excellent regional venue. It draws participants in from up to 40 miles away and is used by c.20 clubs. The investment in the health and fitness is likely to increase the use at the site significantly and may lead to a knock on effect of increasing tennis activity also. The site does have an extensive outreach programme and appears to offer a different type of opportunity than that offered by the Wearside rackets club, which is less than 2 miles away.

Key strategic recommendations therefore include:

- ◀ To set in place a process to coordinate the programming and pricing of facilities (including schools and academies) across the City to ensure that they continue to remain accessible to the whole community.
- ◀ To allocate specific resource to work with schools to extend and optimise affordable community use of their key indoor and built sports facilities to ensure that actual and latent demand is catered for.
- ◀ To align the programming of indoor football, in particular, with outdoor artificial grass based sports hub developments (as per the Washington Leisure Centre model), enabling more time to be made available for a variety of other sports in indoor sports halls.
- ◀ To improve the quality and accessibility of Monkwearmouth Sports Centre to ensure that it can take on at least some of the activity displaced were the Seaburn Centre to close.

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- ◀ To, again, in the context of the uncertain future of the Seaburn Centre, consider the value of developing a larger events facility to accommodate indoor sports in Sunderland.
- ◀ As part of this (and in the business model) consider the potential to work with 'key-holder groups' as part of a process of minimising staffing costs associated with the operation of the venue.
- ◀ To maintain provision at current levels to cater for indoor bowls, tennis and squash
- ◀ To improve the breadth, depth and quality of data collected (and shared) and the associated monitoring and analysis of facility usage to inform future marketing, promotion, programming and pricing etc.

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## APPENDIX 1: Sunderland City Council area profile

### Demographics

Located in the North East, the area is dissected by a series of A roads, the main north/south link being the A19, while in an west/east direction there are a few including the A1231 and A183.

Figure 1: Sunderland with main roads



The data used to describe the area is taken from a range of nationally recognised sources such as the Office for National Statistics, NOMIS, Sport England and Experian. Wherever possible it represents the most up to date information available at the time of the report's preparation. New data is, however, published regularly and at different intervals.

Unemployment data is, for example, released every month while population projections and deprivation data tend to be produced every three to four years and the census of population is conducted once every decade. Within this context, it is noteworthy that a new Index of deprivation is to be published in Summer 2015.

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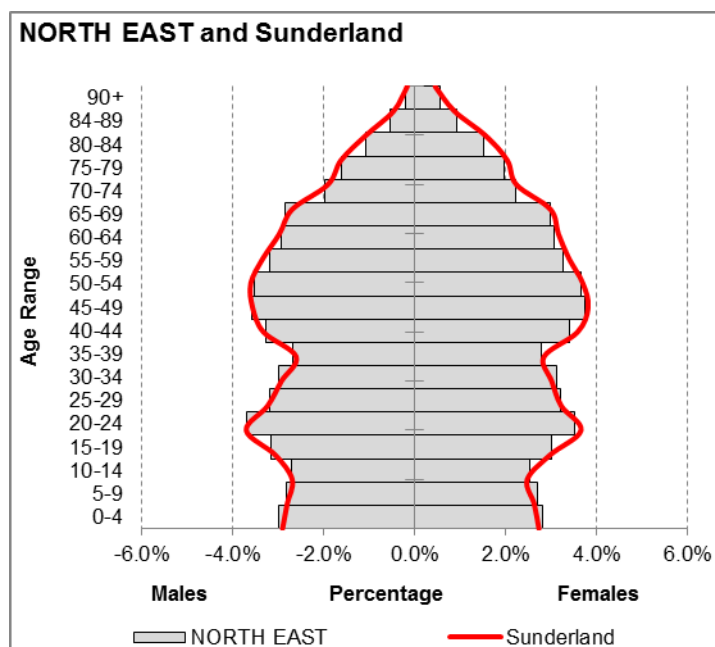
### Population (Data source: 2013 Mid Year Estimate, ONS)

The total population, from the 2013 MYE, in Sunderland was 276,080 (males = 134,377 and females = 141,703).

Figure 2: Comparative age/sex pyramid for Sunderland and the North East

The chart illustrates the population's age and gender composition while, overlaying the red line for Sunderland on top of the grey bars for the region it is easy to see where one dataset is higher or lower than the other.

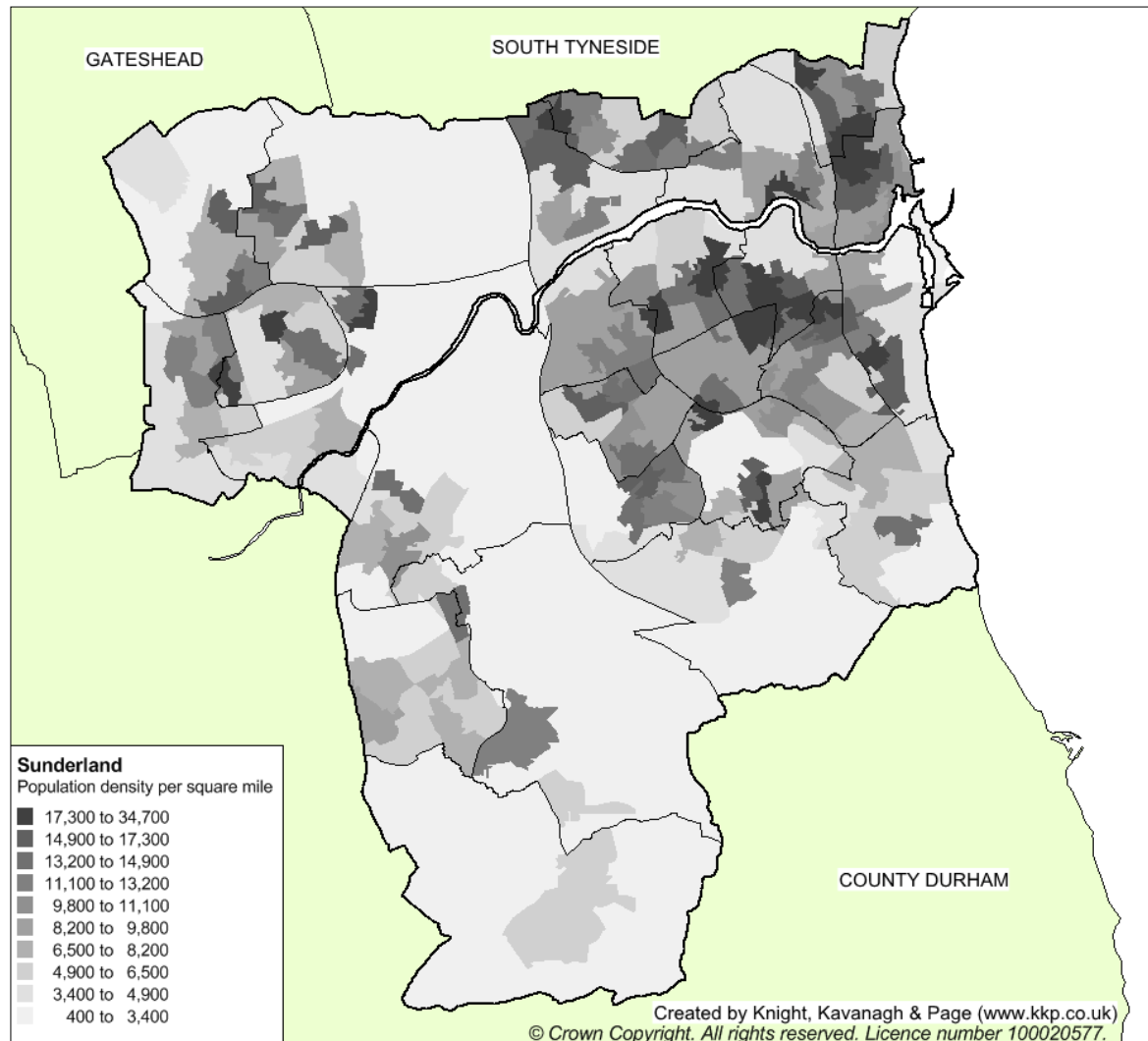
The population age bands in Sunderland closely match those for the North East region. As a combination of factors it suggests careful consideration should be given to the pitching of sports and physical activity offers within the area – Sport England's segmentation model may be interpreted in relation to this age structure (see later).



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The population density map is based on super output areas (SOA) from ONS' most recent Census of population. It covers all parts of the country irrespective of whether the SOA is in an area of high density housing and flats or it covers farms and rural villages. The map's shading, however, allows concentrations of population to be easily identified, for example, major urban areas such as flats, terraced houses and estates tend to show up as the darkest shading while rural areas, housing adjoining parks and other non-residential land uses tend to be the lightest shades.

*Figure 3: Population density 2013 MYE: Sunderland lower super output areas (LSOAs)*



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### **Ethnicity** (Data source: 2011 census of population, ONS)

In broad terms, Sunderland's ethnic composition closely reflects that of England as a whole. According to the 2011 Census of population, the largest proportion (95.9%) of the local population classified their ethnicity as White; this is much higher than the comparative England rate of 85.4%. The next largest population group (by self classification) is Asian, at 2.7% this is markedly lower than the national equivalent (7.8%).

*Table 1: Ethnic composition – Sunderland and England*

Ethnicity	Sunderland		England	
	Number	Percentage	Number	Percentage
White	264,282	95.9%	45,281,142	85.4%
Mixed	1,778	0.6%	1,192,879	2.3%
Asian	7,336	2.7%	4,143,403	7.8%
Black	1,273	0.5%	1,846,614	3.5%
Other	837	0.3%	548,418	1.0%
<b>Total</b>	<b>275,506</b>	<b>100.0%</b>	<b>53,012,456</b>	<b>100.0%</b>

### **Crime** (Data source: 2014 Recorded Crime, Home Office)

During the 12 months to December 2014 the rate for recorded crimes per 1,000 persons in Sunderland was 54.6; this is lower than the equivalent rate for England and Wales as a whole which was 61.3. In both instances the crime rate has fallen since 2011, by around 17.2% for Sunderland and 12.3% for England & Wales.

*Table 2: Comparative crime rates - Sunderland and England & Wales*

Authority	Recorded crime (Jan '14 – Dec '14)	Population 2013 MYE	Recorded crime per 1,000 population
Sunderland	15,093	276,080	54.6
England & Wales	3,493,006	56,948,229	61.3

### **Economic indicators** (Data source: NOMIS 2014)

#### **Economic activity and inactivity**

7 in 10 (71.2%) of Sunderland City Council (SCC)'s 16-64 year olds are economically active (in or seeking employment – Dec 2014) compared to a national figure of 77.3%. The unemployment rate<sup>8</sup> in Sunderland is 9.0%, this is above the North East figure (8.5%) and significantly higher than the national rate (6.2%).

Almost a third (28.8%) of SCC's 16-64 year olds are economically inactive, of these around 1 in 5 are students and 1 in 3 are long term sick.

<sup>8</sup> Note the unemployment rate is modelled by the Office for National Statistics



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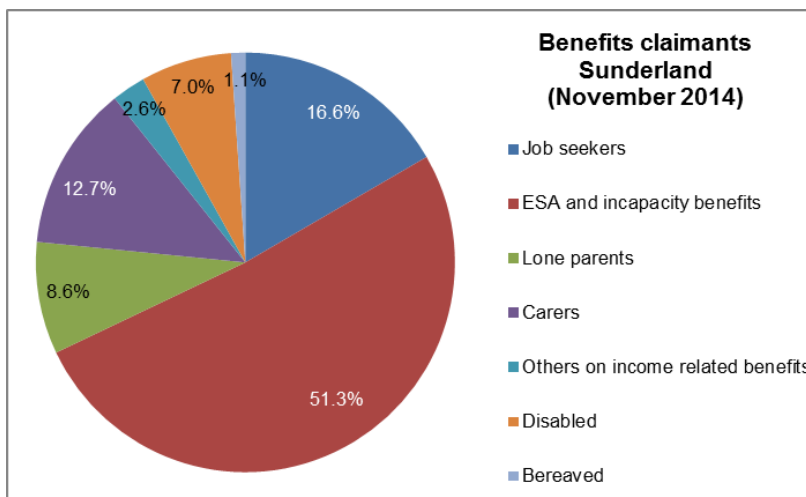
## BUILT LEISURE AND SPORTS ASSESSMENT REPORT

### ***Income and benefits dependency***

The median figure for full-time earnings (2014) in Sunderland is £23,738; the comparative rate for the North East is £24,809 (+4.5%) and for Great Britain is £27,082 (+14.1%).

*Figure 4: Benefits by type of claimant*

In May 2015 there were 5,497 people in Sunderland claiming Job Seekers Allowance (JSA); this represents a decrease of -11.5% when compared to May 2006 (-718). However in May 2014, people claiming JSA only represent 16.6% of benefits claimants in Sunderland, a further 51.3% are claiming ESA<sup>9</sup> and incapacity benefits while 12.7% are carers.



### **Deprivation** (Data source: 2010 indices of deprivation, DCLG)

The following deprivation maps illustrate the ranking of super output areas (SOAs) in Sunderland based on the Department for Communities and Local Government's (DCLG) 'Indices of Multiple Deprivation 2010' (IMD 2010).

The IMD ranks 32,482 SOAs throughout England<sup>10</sup>, with a rank position of one indicating the most deprived SOA in the Country. The IMD 2010 is a valuable source of information about spatial patterns of deprivation in England and can be used to help focus policy and interventions on deprived areas and particular types of deprivation. It comprises 37 different indicators which are grouped into seven separate 'domains' of deprivation, these cover income, employment, health deprivation and disability, education, skills and training, barriers to housing and services, living environment deprivation and crime. The seven main 'domains' are combined to make an overall 'multiple rank' of deprivation; this is the most frequently used measure.

Relative to other parts of the country Sunderland experiences high levels of deprivation; over half of the City's population (52.5%) falls within the areas covered by the country's three most deprived cohorts compared to a national average of c.30%. Conversely, 9.8% live in the three least deprived groupings in the country, this compares to a 'norm' of c.30%.

<sup>9</sup> Employment and Support Allowance is directly targeted to support those who are ill or disabled.

<sup>10</sup> SOAs relate to the geography used for the 2001 Census.

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Table 3: IMD cohorts - Sunderland

IMD cumulative norm		Multiple deprivation			Health deprivation		
		Population in band	Percent of population		Population in band	Percent of population	
Most deprived	10.0	47,594	16.8%	16.8%	87,202	30.8%	30.8%
	20.0	54,619	19.3%	36.1%	73,330	25.9%	56.6%
	30.0	46,715	16.5%	52.5%	46,601	16.4%	73.1%
	40.0	37,373	13.2%	65.7%	33,793	11.9%	85.0%
	50.0	18,634	6.6%	72.3%	33,753	11.9%	96.9%
	60.0	22,567	8.0%	80.2%	7,407	2.6%	99.5%
Least deprived	70.0	28,143	9.9%	90.2%	1,423	0.5%	100.0%
	80.0	16,276	5.7%	95.9%	0	0.0%	100.0%
	90.0	11,588	4.1%	100.0%	0	0.0%	100.0%
	100.0	0	0.0%	100.0%	0	0.0%	100.0%

A similar pattern, to that seen for multiple-deprivation, is seen in relation to health – yet more so. Almost three quarters of Sunderland's population (73.1%) falls within the areas covered by the three most deprived cohorts, this compares to a national average of c.30%. Conversely, none live in the three least deprived groupings compared to a 'norm' of c.30%.

Figure 5: Index of multiple deprivation

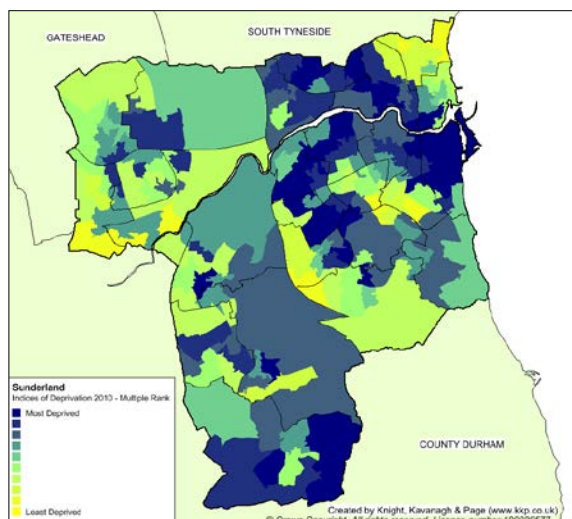
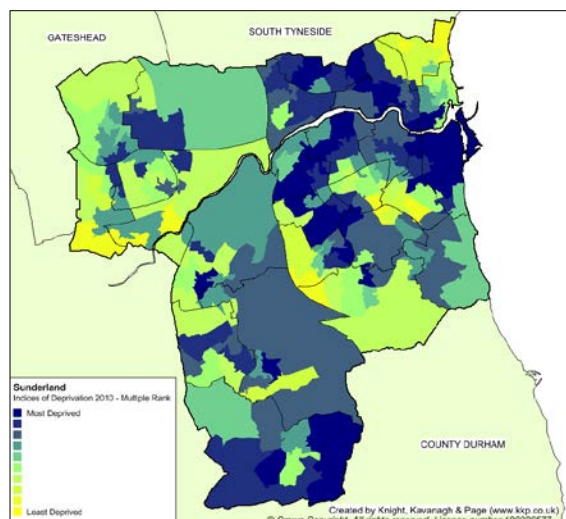
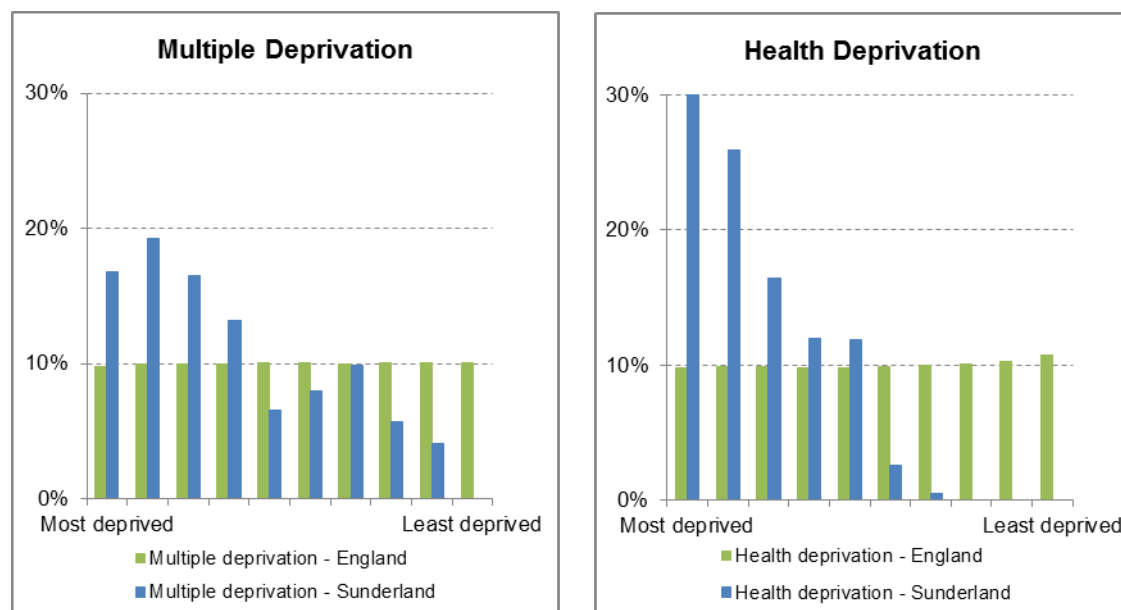


Figure 6: IMD Health domain



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Figure 7: IMD and Health domain comparisons – Sunderland and England.



## Health data

(Data sources: ONS births and deaths, NCMP<sup>11</sup> and NOO<sup>12</sup>)

In 2013 there were 3,009 live births in Sunderland; there were also 2,939 deaths; consequently there were 70 more births than deaths in 2013. Population change combines these factors alongside internal and international migration statistics.

In keeping with patterns seen alongside higher levels of health deprivation, life expectancy in Sunderland is lower than the national figure; the male rate is currently 77.3 compared to 79.4 for England, and the female equivalent is 80.9 compared to 83.1 nationally.<sup>13</sup>

<sup>11</sup> National Child Measurement Program

<sup>12</sup> National Obesity Observatory

<sup>13</sup> Office of National Statistics: Life Expectancy at Birth by local areas in the United Kingdom, 2013.

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## Weight and obesity

Obesity is widely recognised to be associated with health problems such as type 2 diabetes, cardiovascular disease and cancer. At a national level, the resulting NHS costs attributable to overweight and obesity<sup>14</sup> are projected to reach £9.7 billion by 2050, with wider costs to society estimated to reach £49.9 billion per year. These factors combine to make the prevention of obesity a major public health challenge.

Adult and child obesity rates in Sunderland are above both the national and regional averages.

Figure 8: Adult and child obesity rates

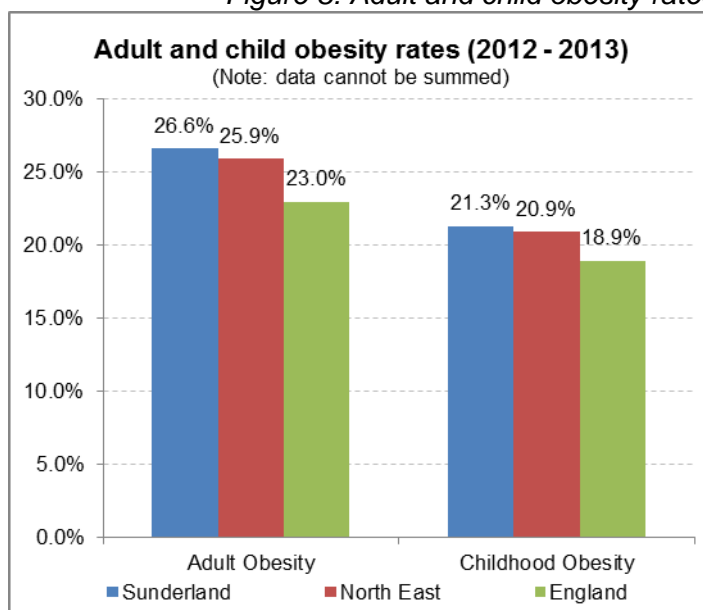
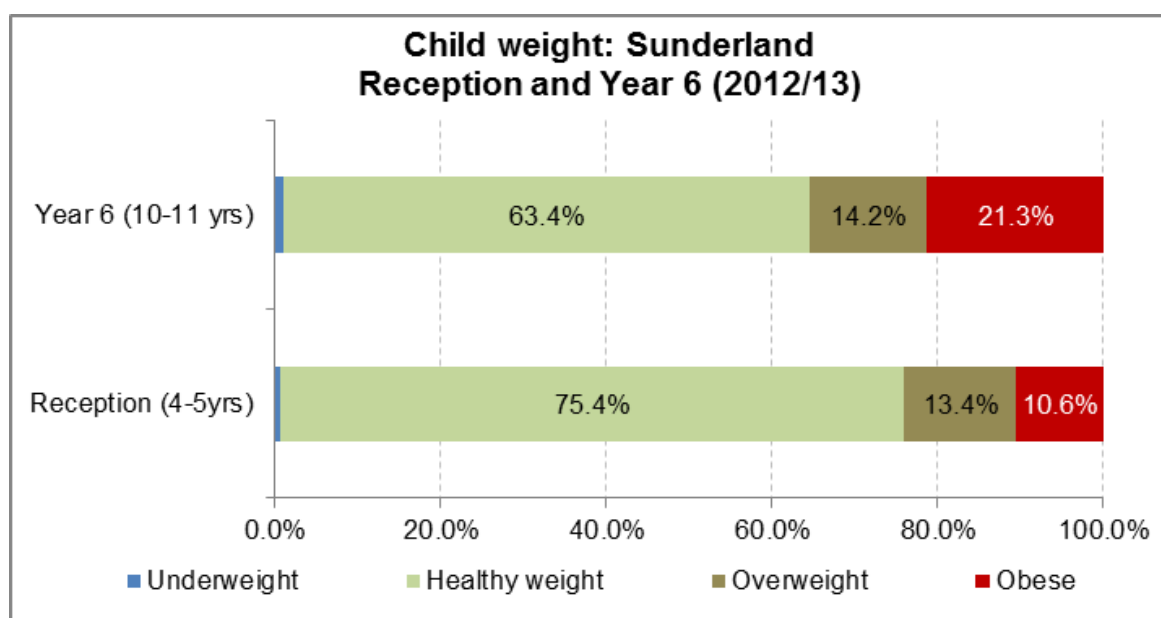


Figure 9: Child weight – reception and year 6



As with many other areas, obesity rates increase significantly between the ages of 4 and 11. Over 1 in 10 (10.6%) of children in Sunderland are obese in their Reception Year at school and 13.4% are overweight; by Year 6 these figures have risen to over 1 in 5 (21.3%) being obese and 14.2% being overweight. In total, by Year 6, over a third (35.5%) are either overweight or obese.

<sup>14</sup> In adults, obesity is commonly defined as a body mass index (BMI) of 30 or more. For children in the UK, the British 1990 growth reference charts are used to define weight status.

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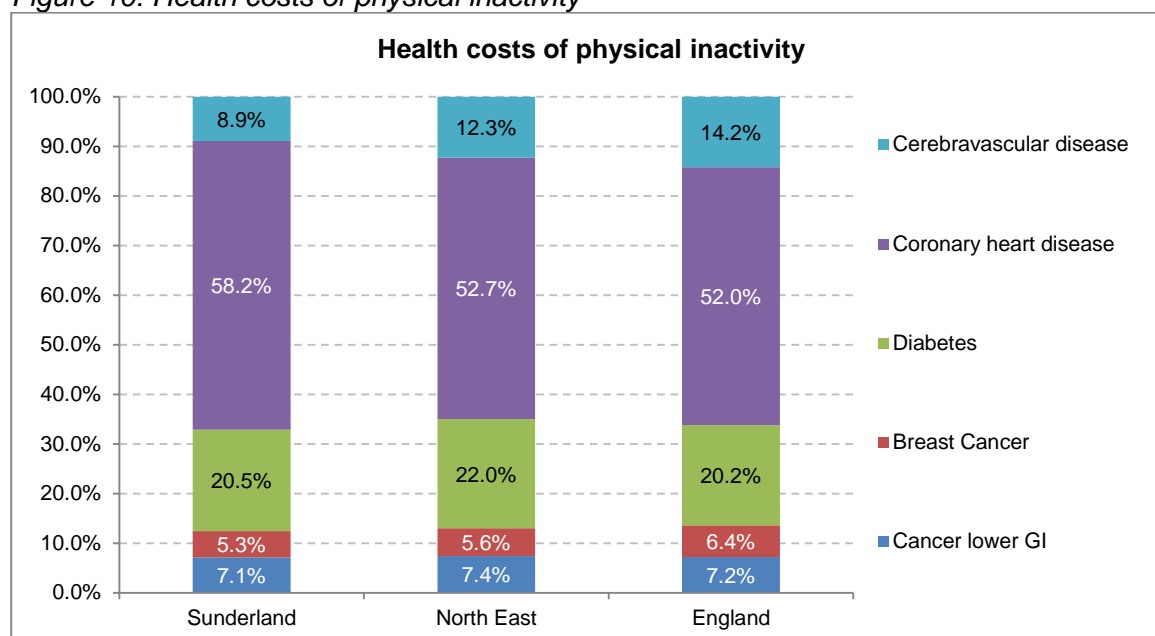
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### ***Health costs of physical inactivity***

The British Heart Foundation (BHF) Promotion Research Group has reviewed the costs of avoidable ill health that it considers are attributable to physical inactivity. Initially produced for the DoH report Be Active Be Healthy (2009) the data has subsequently been reworked for Sport England.

Illnesses, that the BHF research relates to, include cancers such as bowel cancer, breast cancer, type 2 diabetes, coronary heart disease and cerebrovascular disease e.g. stroke. The data indicates a similar breakdown between these illnesses regionally and nationally.

*Figure 10: Health costs of physical inactivity*



The annual cost to the NHS of physical inactivity in Sunderland is estimated at £6,522,580.

When compared to regional and national costs per 100,000, Sunderland (£2,384,649) is 31.2% above the national average (£1,817,285) and 18.2% above the regional average (£2,016,905).

It should also be noted that in addition to the NHS costs there are also significant costs to industry in terms of days of productivity lost due to back pain etc. These have also been costed in CBI reports and are of similar magnitude to NHS costs.

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### Active People Survey

Active People is the largest survey of sport and active recreation in Europe and is in its eighth year (APS8 October 2013 – 2014). It collects data on the type, duration, frequency and intensity of adult participation by type of sport, recreation and cultural activity. The survey also covers volunteering, club membership, tuition as an instructor or coach, participation in competitive sport and overall satisfaction with local sports provision.

Volunteering was only asked to around half of those questioned resulting in most of the data being suppressed. The nearest neighbours are from CIPFA Nearest Neighbours 2014.

Table 4: Active People Survey for all adults – Sunderland and nearest neighbours

KPI	National %	North East %	Sunderland %	Nearest neighbours			
				South Tyneside %	Plymouth %	North East Lincolnshire %	Redcar & Cleveland %
1x30 Indicator - Participation in 30 minutes moderate intensity sport per week.							
2013/14	35.8	33.9	34.7	30.9	39.1	34.6	30.5
KPI 2 - At least 1 hour per week volunteering to support sport.							
2013/14	12.5	10.5	*	*	*	*	*
KPI 3 - Club membership in the last 4 weeks.							
2013/14	21.6	18.8	21.2	17.0	23.8	21.9	17.6
KPI 4 - Received tuition / coaching in last 12 months.							
2013/14	16.4	14.1	12.9	10.4	24.8	17.7	12.9
KPI 5 - Taken part in organised competitive sport in last 12 months.							
2013/14	13.3	12.3	*	*	26.1	*	*

\* Data unavailable, the question was not asked, or because of insufficient sample size

Table 4 shows key indicators from APS 8 for Sunderland and compares these to the corresponding rates for the North East, England and statistical 'nearest neighbours' based on a CIPFA (the Chartered Institute of Public Finance and Accountancy) model. This type of comparison has been developed to aid local authorities to compare and benchmark. The model applies a range of socio-economic indicators, including population, unemployment rates, tax base per head of population, council tax bands and mortality ratios upon which the specific family group (nearest neighbours) is calculated. Key findings include:

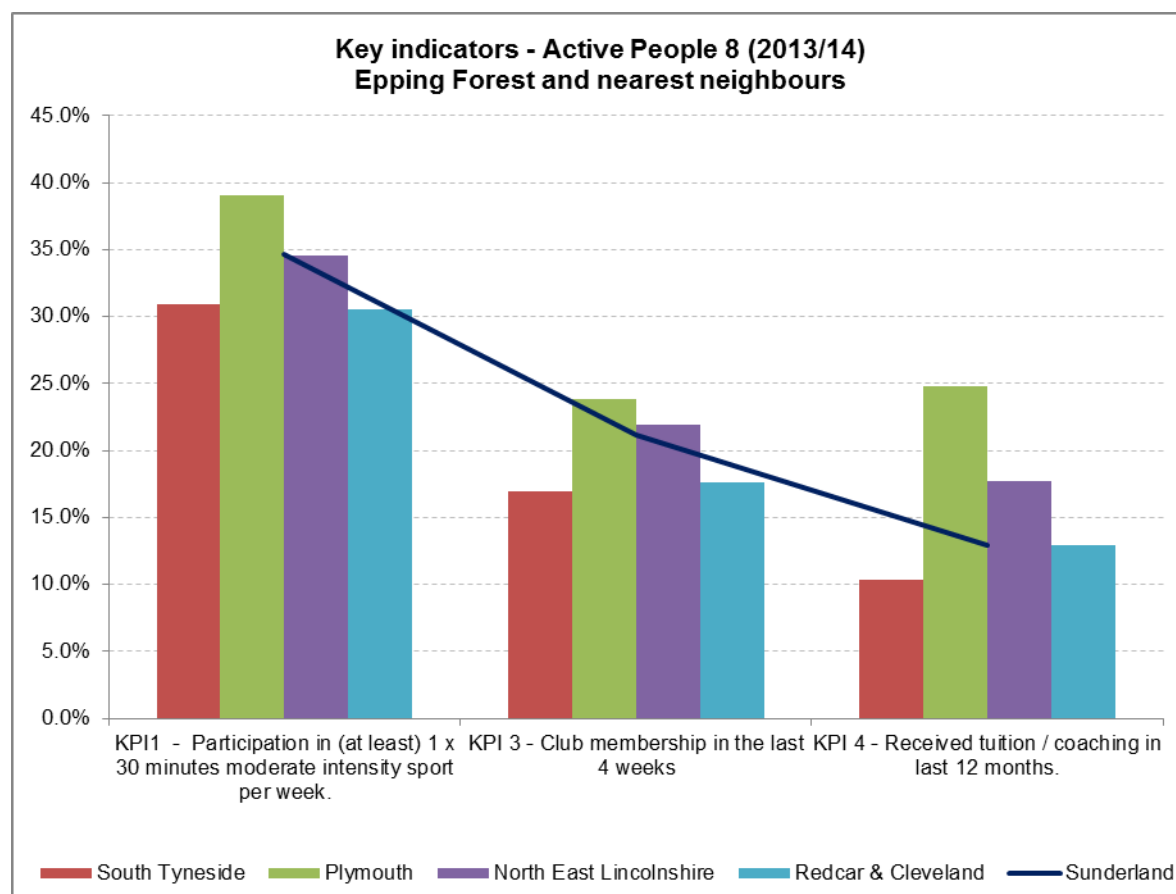
- Participation - just over a third (34.7%) of adults participated in at least 1 x 30 minutes moderate intensity sport per week. This was below the national average

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(35.8%) and the regional average (33.9%). It was above all but one of its 'nearest neighbours' which ranged from 30.5% to 39.1%.

- Sports club membership - just over 1 in 5 (21.2%) are members of a sports club, based on the four weeks prior to the AP survey. This is below the national average (21.6%) and above the regional rate (18.8%) and is below two of its 'nearest neighbours'.
- Sports tuition - just over 1 in 8 (12.9%) received sports tuition during the 12 months prior to the AP survey. This was below the regional and the national averages. It is below two of its 'nearest neighbours'.

Figure 11: Key AP indicators, Sunderland and nearest neighbours (2013/14).



KPI 2 (Volunteering) and KPI 5 (competitive sport) is not shown on this chart due to suppressed data.



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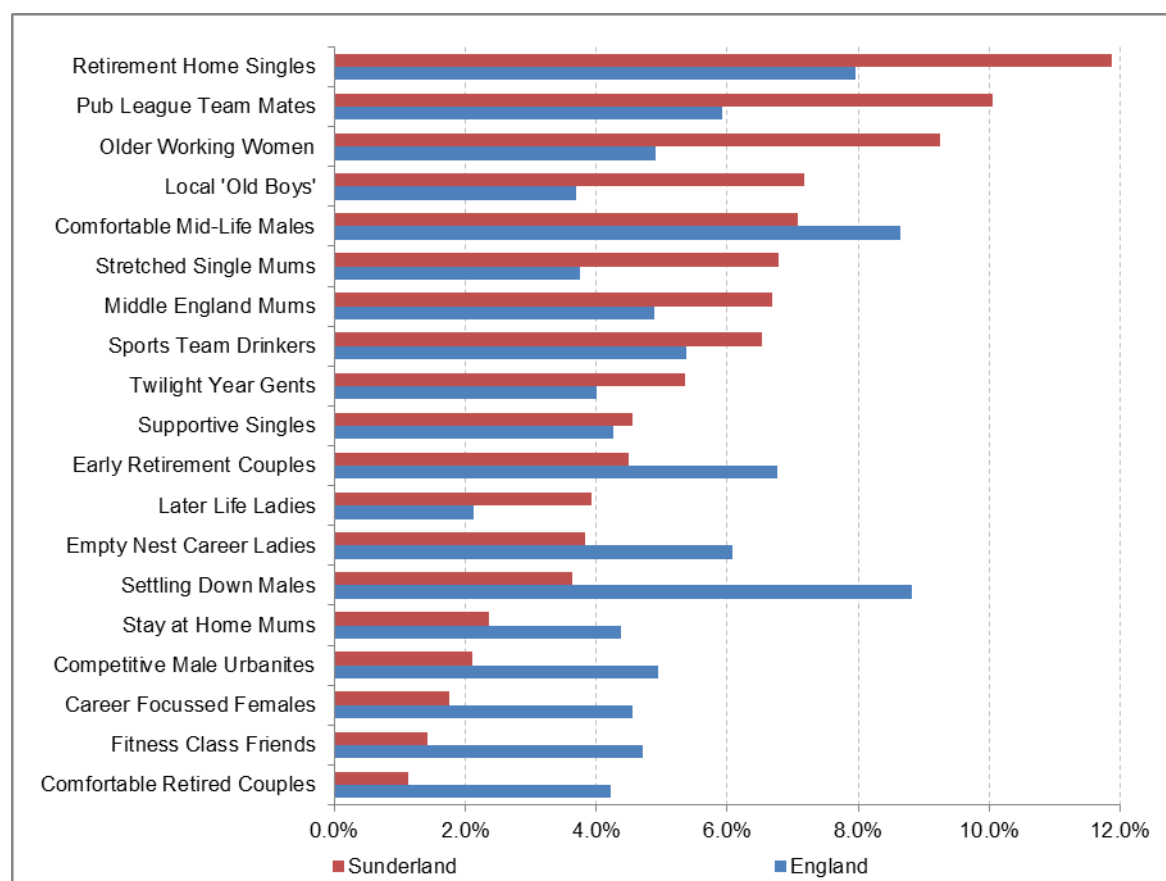
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### Sporting segmentation

(Data source: Market segmentation, Sport England)

Sport England has classified the adult population via a series of 19 market segments which provide an insight into the sporting behaviours of individuals throughout the country. The profiles cover a wide range of characteristics, from gender and age to the sports that people take part in, other interests, the newspapers that they read etc. The segmentation profile for Sunderland indicates 'Retirement Home Singles' to be the largest segment of the adult population at 11.87% (26,402) compared to a national average of 7.97%.

Figure 12: SE segmentation – Sunderland compared to England



Knowing which segments are most dominant in the local population is important as it can help direct provision and programming. Whilst the needs of smaller segments should not be ignored, it is important for Sunderland to understand which sports are enjoyed by the largest proportion(s) of the population. Segmentation also enables partners to make tailored interventions, communicate effectively with target market(s) and better understand participation in the context of life stage and lifecycles.

The following data indicates that Elsie & Arnold, Kev and Brenda are the three dominant groups, representing 31.2% (69,352) of the adult population, compared to 18.8% nationally.

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Table 5: Sport England market segmentation summaries

Segment, description and its top three sports nationally			
Retirement Home Singles	Elsie & Arnold	26,402	Sunderland
Retired singles or widowers (aged 66+), predominantly female, living in sheltered accommodation.		11.87%	
		10.62%	
Keep fit/gym (10%)	Swimming (7%) Bowls (3%)	7.97%	England
Pub League Team Mates	Kev	22,357	Sunderland
Blokes (aged 36-45) who enjoy pub league games and watching live sport.		10.05%	
		8.62%	
Keep fit/gym (14%)	Football (12%) Cycling (11%)	5.93%	England
Older Working Women	Brenda	20,593	Sunderland
Middle aged ladies (aged 46-65), working to make ends meet.		9.26%	
		7.73%	
Keep fit/gym (15%)	Swimming (13%) Cycling (4%)	4.91%	England
Local 'Old Boys'	Terry	15,972	Sunderland
Generally inactive older men (aged 56-65), low income and little provision for retirement.		7.18%	
		6.01%	
Keep fit/gym (8%)	Swimming (6%) Cycling (5%)	3.69%	England
Comfortable Mid-Life Males	Philip	15,730	Sunderland
Mid-life professional (aged 46-55), sporty males with older children and more time for themselves.		7.07%	
		7.75%	
Cycling (16%)	Keep fit/gym (15%) Swimming (12%)	8.65%	England
Stretched Single Mums	Paula	15,076	Sunderland
Single mum (aged 26-45) with financial pressures, childcare issues and little time for pleasure.		6.78%	
		5.71%	
Keep fit/gym (18%)	Swimming (17%) Cycling (5%)	3.74%	England
Middle England Mums	Jackie	14,857	Sunderland
Mums (aged 36-45) juggling work, family and finance.		6.68%	
		6.55%	
Keep fit/gym (27%)	Swimming (20%) Cycling (9%)	4.88%	England
Sports Team Drinkers	Jamie	14,507	Sunderland
Young blokes (aged 18-25) enjoying football, pints and pool.		6.52%	
		6.03%	
Football (28%)	Keep fit/gym (22%) Athletics (12%)	5.37%	England
Twilight Year Gents	Frank	11,935	Sunderland
Retired men (aged 66+) with some pension provision and limited sporting opportunities.		5.37%	
		4.95%	
Golf (7%)	Keep fit/gym (6%) Bowls (6%)	4.01%	England
Supportive Singles	Leanne	10,153	Sunderland
Young (aged 18-25) busy mums and their supportive college mates. Least active segment of her age group.		4.56%	
		4.44%	
Keep fit/gym (23%)	Swimming (18%) Athletics (9%)	4.25%	England
Early Retirement Couples	Roger & Joy	9,996	Sunderland
Free-time couples nearing the end of their careers (aged 56-65).		4.49%	
		5.50%	
Keep fit/gym (13%)	Swimming (13%) Cycling (8%)	6.77%	England
Later Life Ladies	Norma	8,729	Sunderland
Older ladies (aged 56-65), recently retired, with a basic income to enjoy their lifestyles.		3.92%	
		3.37%	
Keep fit/gym (12%)	Swimming (10%) Cycling (2%)	2.12%	England

Segment, description and its top three sports nationally			
Empty Nest Career Ladies	Elaine	8,500	Sunderland

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Mid-life professionals who have more time for themselves since their children left home (aged 46-55).	3.82%	
	4.53%	North East
Keep fit/gym (21%)      Swimming (18%)      Cycling (7%)	6.07%	England
Settling Down Males      Tim	8,072	
Sporty male professionals (aged 26-45), buying a house and settling down with partner.	3.63%	Sunderland
	5.14%	North East
Cycling (21%)      Keep fit/gym (20%)      Swimming (15%)	8.83%	England
Stay at Home Mums      Alison	5,266	
Mums with a comfortable, but busy, lifestyle (aged 36-45).	2.37%	Sunderland
	3.36%	North East
Keep fit/gym (27%)      Swimming (25%)      Cycling (12%)	4.39%	England
Competitive Male Urbanites      Ben	4,704	
Male (aged 18-25), recent graduates, with a 'work-hard, play-hard' attitude. Most sporty of 19 segments.	2.11%	Sunderland
	2.89%	North East
Football (33%)      Keep fit/gym (24%)      Cycling (18%)	4.94%	England
Career Focussed Females      Helena	3,926	
Single professional women, enjoying life in the fast lane (aged 26-45).	1.76%	Sunderland
	2.30%	North East
Keep fit/gym (26%)      Swimming (23%)      Cycling (11%)	4.55%	England
Fitness Class Friends      Chloe	3,166	
Young (aged 18-25) image-conscious females keeping fit and trim.	1.42%	Sunderland
	2.23%	North East
Keep fit/gym (28%)      Swimming (24%)      Athletics (14%)	4.71%	England
Comfortable Retired Couples      Ralph & Phyllis	2,502	
Retired couples (aged 66+), enjoying active and comfortable lifestyles.	1.12%	Sunderland
	2.26%	North East
Keep fit/gym (10%)      Swimming (9%)      Golf (7%)	4.22%	England

### The most popular sports

A further aspect of the Active People survey and SE segmentation is that it makes it possible to identify the top five sports within Sunderland. As with many other areas, swimming and gym are among the most popular activities and are known to cut across age groups and gender; in Sunderland over 1 in 7 adults go swimming, on average, at least once a month. The next most popular activity is gym which 12.6% of adults do on a relatively regular basis.

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Table 6: Most popular sports in Sunderland (Source: SE Area Profiles)

Sport	Sunderland		North East		England	
	No. (000s)	Rate	No. (000s)	Rate	No. (000s)	Rate
Swimming	31.4	13.2%	251.7	11.7%	4,896.9	11.5%
Gym	29.9	12.6%	240.1	11.2%	4,622.7	10.9%
Football	18.4	7.7%	175.8	8.2%	2,689.7	6.3%
Cycling	13.5	5.7%	152.2	7.1%	3,458.9	8.1%
Fitness & Conditioning	11.1	4.7%	147.8	6.9%	2,854.7	6.7%

### Mosaic

(Data source: 2014 Mosaic analysis, Experian)

Mosaic 2014 is a similar consumer segmentation product and classifies all 25.2 million households into 15 groups, 66 household types and 238 segments. This data can be used to paint a picture of UK consumers in terms of their social-demographics, lifestyles, culture and behaviour and tends to be used to draw out population characteristics for the backdrop to library usage and other non-sporting activities. The following table shows the top five mosaic classifications in Sunderland compared to the country as a whole. The dominance of these five segments can be seen inasmuch as they represent over two thirds (67.1%) of the population compared to a national equivalent rate of just over a third (34.2%).

Table 7: Mosaic – main population segments in Sunderland

Mosaic group description	Sunderland		National %
	#	%	
1 - Vintage Value	51,417	18.7%	3.4%
2 - Municipal Challenge	49,253	17.9%	5.0%
3 - Family Basics	31,653	11.5%	9.8%
4 - Suburban Stability	26,537	9.6%	12.6%
5 - Senior Security	25,774	9.4%	3.4%

The largest segment profiled for Sunderland is the 'Vintage Value' group, making up 18.7% of the adult population in the area, this approaches six times the national rate (3.4%). This group is defined as 'Elderly people who mostly live alone, either in social or private housing, often built with the elderly in mind. Levels of independence vary, but with health needs growing and incomes declining, many require an increasing amount of support.'

# SUNDERLAND CITY COUNCIL BUILT LEISURE AND SPORTS ASSESSMENT REPORT

Figure 13: Mosaic segmentation – Sunderland compared to England

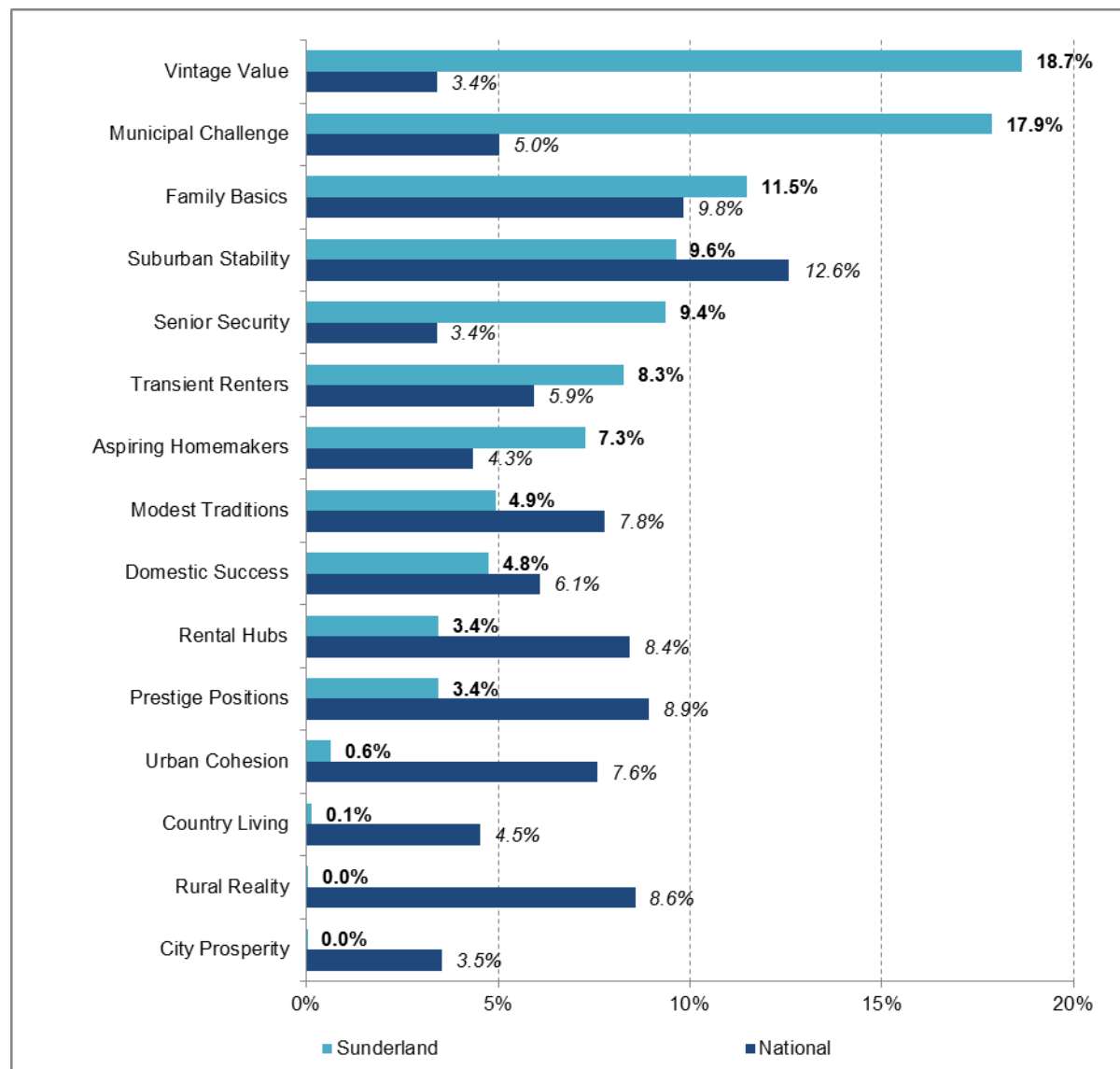



Table 8: Dominant Mosaic profiles in Sunderland

<p><b>Vintage Value</b></p> 	<p>Elderly people who mostly live alone, either in social or private housing, often built with the elderly in mind. Levels of independence vary, but with health needs growing and incomes declining, many require an increasing amount of support.</p>
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# SUNDERLAND CITY COUNCIL BUILT LEISURE AND SPORTS ASSESSMENT REPORT

## Municipal Challenge



Long-term social renters living in low-value multi-storey flats in urban locations, or small terraces on outlying estates. These are challenged neighbourhoods with limited employment options and correspondingly low household incomes.

## Family Basics



Families with children who have limited budgets and can struggle to make ends meet. Their homes are low cost and are often found in areas with fewer employment options.

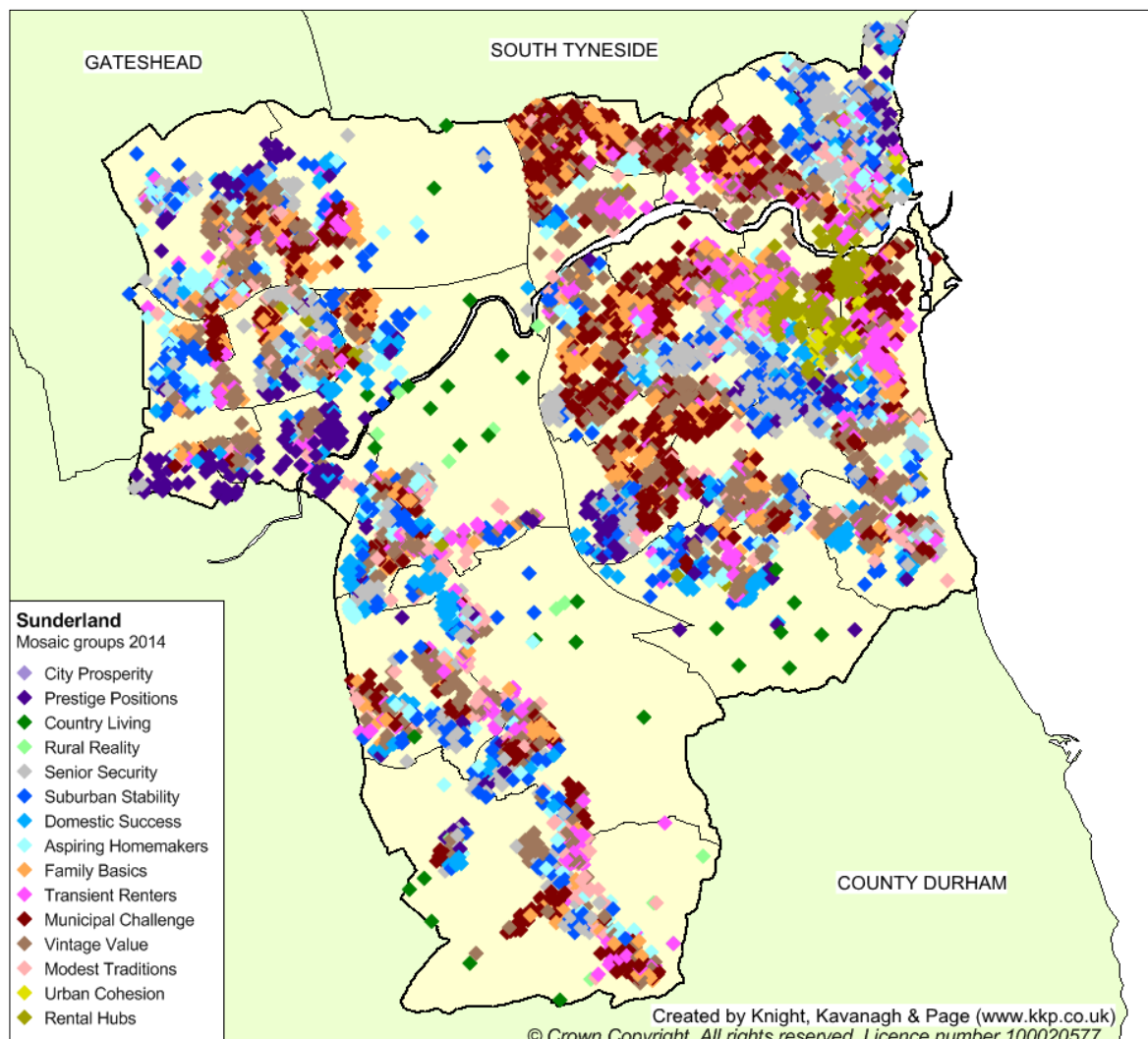


Figure 14: Distribution of Mosaic segments in Sunderland

# SUNDERLAND CITY COUNCIL BUILT LEISURE AND SPORTS ASSESSMENT REPORT

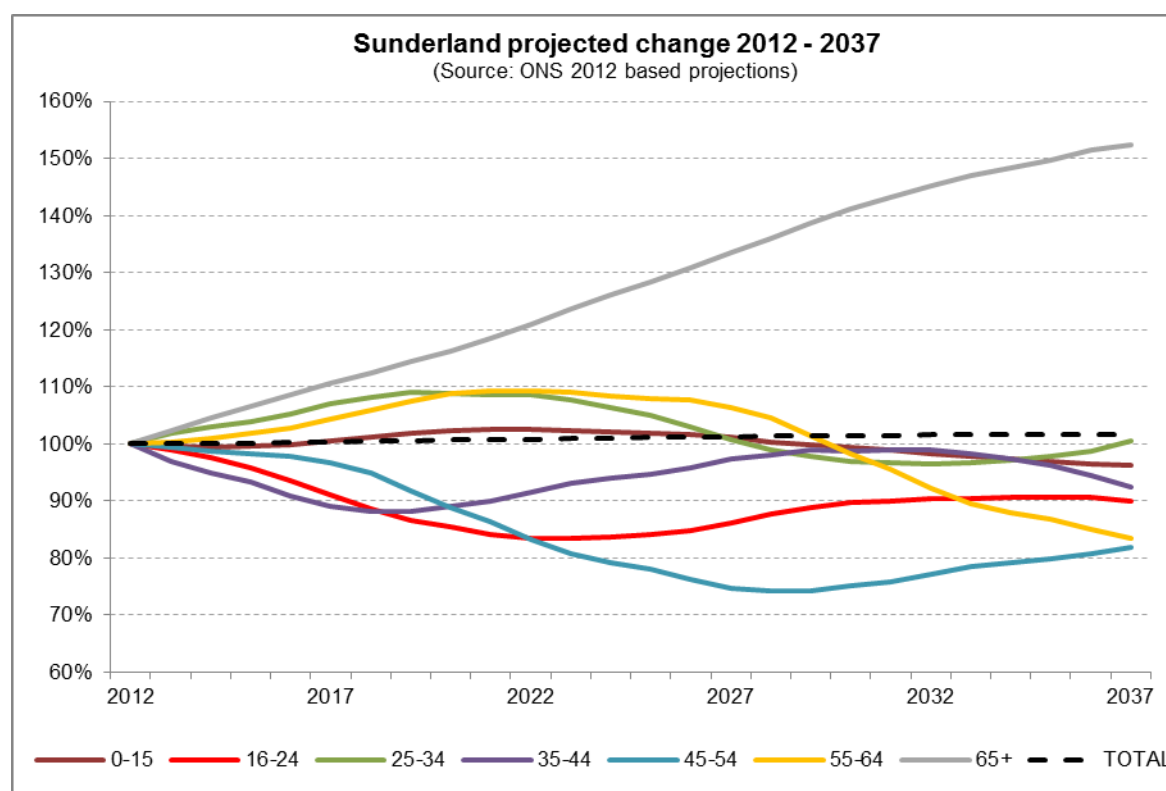
## Population Projections

### *Strategic planning: Change over 25 years (2012 to 2037<sup>15</sup>)*

At strategic and operational levels plans to increase levels of physical activity must not be set in stone, they should be flexible and respond to predictable changes in age structure, gender and ethnic composition. The most recent ONS projections indicate a rise of 1.7% in Sunderland's population (+4,710) over the 25 years from 2012 to 2037.

Over this extended timeframe fluctuations are seen in rise and fall at different points across the majority of age groups with population change acting more like a wave than a straight line (see figure 15). For example the number of 16-24 year olds falls by c.16% between 2012 and 2023 before rising again to -10.0% less than its 2012 baseline by 2037.

*Figure 15: Projected population change (2012 -2037)*



<sup>15</sup> Office for National Statistics 2012-based population projections (data released May 2014)



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## BUILT LEISURE AND SPORTS ASSESSMENT REPORT

Table 9: Sunderland - ONS projected population (2012 to 2037)

Age (years)	Number			Age structure %			Change 2012 - 2037		
	2012	2024	2037	2012	2024	2037	2012	2024	2037
0-15	48,148	49,153	46,350	17.5%	17.6%	16.5%	100.0%	102.1%	96.3%
16-24	34,087	28,531	30,672	12.4%	10.2%	10.9%	100.0%	83.7%	90.0%
25-34	33,500	35,671	33,683	12.1%	12.8%	12.0%	100.0%	106.5%	100.5%
35-44	35,159	33,068	32,514	12.8%	11.9%	11.6%	100.0%	94.1%	92.5%
45-54	40,809	32,322	33,434	14.8%	11.6%	11.9%	100.0%	79.2%	81.9%
55-64	35,284	38,248	29,482	12.8%	13.7%	10.5%	100.0%	108.4%	83.6%
65+	48,756	61,509	74,318	17.7%	22.1%	26.5%	100.0%	126.2%	152.4%
<b>Total</b>	<b>275,743</b>	<b>278,503</b>	<b>280,453</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>101.0%</b>	<b>101.7%</b>

Population projections are based on straightforward process which models observed trends in fertility and mortality rates plus migration factors. Nevertheless they can illustrate a relatively complex picture of change. Several key points are outlined below:

- One of the most notable points is the progressive rise in the number of 0-15 year olds, rising by +1,005 (+2.1%) over the first half of the projection (to 2024). This will place pressure on differing types of sporting, educational and cultural provision (facility and services) by age, gender and sub-groups of the cohort.
- In contrast, there is predicted to be decline in the number of 16-24 year olds, -16.3% in the first period (-5,556) followed by growth back to -10.0% (-3,415) in the second period. Consequently Sport England's target of '*increasing the number of 14-25 year olds playing sport once a week*' may prove difficult during the first period in which numerical stasis would represent a marginal increase in participation rates.
- There is a continuous increase in the numbers of persons aged 65+ and a need to consider varying sports offers for this age group. This represents an increase of +26.2% (+12,753) in the first period continuing to rise to +52.4% (+25,562) between 2012 and 2037. While the age group represented 17.7% of Sunderland's population in 2012 it is projected to be 26.5% of the total by 2037 - this over a quarter of the population.

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## BUILT LEISURE AND SPORTS ASSESSMENT REPORT

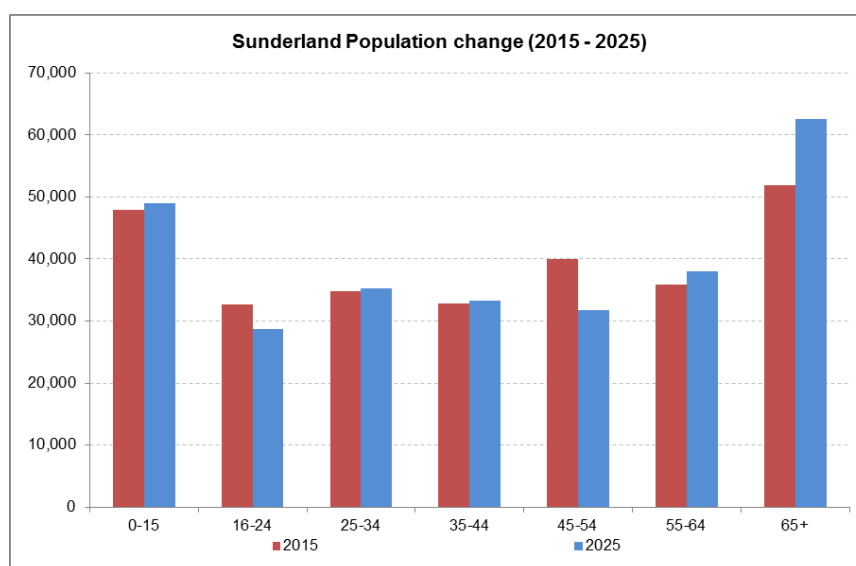
### ***Service planning: Change over the coming decade (2015 – 2025)***

While strategic planning needs to consider change over 20 to 25 years, service planning is often more closely aligned to a much shorter time horizon, typically 5 to 10 years. Over the decade to 2025 it is projected that the overall number of people in Sunderland will rise by +2,616 (+0.9%). However, significant age specific variations will have implications for different markets, economic and health issues, for example, there will be:

- ◆ +1,119 (+2.3%) more 0-15 year olds; and
- ◆ -8,243 (-20.6%) fewer 45-54 year olds; and
- ◆ +2,146 (+6.0%) more 55-64 year olds; and
- ◆ +10,686 (+27.2%) more people aged 65+.

*Figure 16: Projected population change (2015 -2025)*

Facilities planning for increases in the 65+ and 0-15 age groups may lead the Council to determine that these opposing age groups require very different provision at key times of the day and week from other users. However, just as the 65+ age group often requires activities during the day activities for 0-5 year olds often follow similar time patterns. Conversely, activities for 5-15 year olds are focused more closely on after school and weekend activities.



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### BUILT LEISURE AND SPORTS ASSESSMENT REPORT

*Map 5 table: IMD 2010 populations: Sunderland 3+ court CU sports halls, including Seaburn, 20 minute walk time catchment*













IMD 2010 10% bands	Sunderland		Sports Hall (3 Court+) with community use catchment populations by IMD			
	Persons	Population %	Persons inside catchment	Population inside %	People outside catchment	Population outside (%)
0 - 10	47,594	16.8%	42,513	15.0%	5,081	1.8%
10.1 - 20	54,619	19.3%	52,245	18.4%	2,374	0.8%
20.1 - 30	46,715	16.5%	30,240	10.7%	16,475	5.8%
30.1 - 40	37,373	13.2%	34,076	12.0%	3,297	1.2%
40.1 - 50	18,634	6.6%	11,732	4.1%	6,902	2.4%
50.1 - 60	22,567	8.0%	20,098	7.1%	2,469	0.9%
60.1 - 70	28,143	9.9%	20,377	7.2%	7,766	2.7%
70.1 - 80	16,276	5.7%	15,616	5.5%	660	0.2%
80.1 - 90	11,588	4.1%	9,256	3.3%	2,332	0.8%
90.1 - 100	0	0.0%	0	0.0%	0	0.0%
<b>Total</b>	<b>283,509</b>	<b>100.0%</b>	<b>236,153</b>	<b>83.3%</b>	<b>47,356</b>	<b>16.7%</b>

# SUNDERLAND BUILT LEISURE AND SPORTS STRATEGIC NEEDS ASSESSMENT DRAFT REPORT

## APPENDIX 2: SPORT ENGLAND MARKET SEGMENTATION













	Segment name and description	Segment characteristics	Main age band	Socio eco group	1 x 30	% Eng-popn	Media and Communications	Key brands	Top sports (played at least once a month) and sporting behaviour
					3 x 30				
	<b>Ben</b> Competitive Male Urbanites  Also known as Josh, Luke, Adam, Matesuz, Kamil	Male, recent graduates, with a 'work-hard, play-hard' attitude. <i>Graduate professional, single.</i>	18-25	ABC1	69%	4.9%	Ben is a heavy internet user, using it for sports news, personal emails, social networking and buying films, games and tickets. He is highly responsive to internet advertising.		Ben is a very active type and takes part in sport on a regular basis. He is the sportiest of the 19 segments. Ben's top sports are football (33%), keep fit/ gym (24%), cycling (18%), athletics including running (15%) and swimming (13%).
					39%				
	<b>Jamie</b> Sports Team Lads  Also known as Ryan, Nathan, Ashley, Adeel, Pawel	Young blokes enjoying football, pints and pool. <i>Vocational student, single.</i>	18-25	C2DE	59%	5.4%	Jamie is a prolific mobile phone user and as uses this as a primary source of information. He likes to text rather than talk, and uses 3G for sports results and sms text information services.		Jamie is a very active type that takes part in sport on a regular basis. Jamie's top sports are football (28%), keep fit and gym (22%), athletics including running (12%), cycling (12%) and swimming (10%).
					31%				
	<b>Chloe</b> Fitness Class Friends  Also known as Nisha, Sophie, Lauren, Charlotte, Lucy	Young image-conscious females keeping fit and trim. <i>Graduate professional, single.</i>	18-25	ABC1	56%	4.7%	Chloe is a heavy internet and mobile phone user. She uses her mobile to keep in contact with friends and family, preferring this to her landline. Chloe has a new 3G phone which provides internet access but is still likely to use text as her first source of information.		Chloe is an active type that takes part in sport on a regular basis. Chloe's top sports are keep fit/ gym (28%), swimming (24%), athletics including running (14%), cycling (11%) and equestrian (5%)
					23%				
	<b>Leanne</b> Supportive Singles  Also known as Hayley, Kerry, Danielle, Nisha, Saima	Young busy mums and their supportive college mates. <i>Student or PT vocational, Likely to have children.</i>	18-25	C2DE	42%	4.3%	Leanne is a light internet user and a heavy mobile phone user, using this instead of a landline to contact friends. She uses sms text services and also entertainment features on her mobile. Leanne's mobile is likely to be pay-as-you-go and she responds to text adverts.		Leanne is the least active segment of her age group. Leanne's top sports are keep fit/ gym (23%), swimming (18%), athletics including running (9%), cycling (6%) and football (4%)
					17%				
	<b>Helena</b> Career Focused Female  Also known as Claire, Tamsin, Fiona, Sara, Joanne	Single professional women, enjoying life in the fast lane <i>Full time professional, single.</i>	26-45	ABC1	53%	4.6%	Helena always has her mobile and PDA on hand so that she is contactable for work and social calls. She is a heavy internet user, but mainly from home, and uses this as her primary source of information.		Helena is a fairly active type that takes part in sport on a regular basis. Helena's top sports are keep fit/ gym (26%), swimming (22%), cycling (11%), athletics including running (9%), and equestrian (3%).
					19%				

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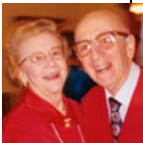

	Segment name and description	Segment characteristics	Main age band	Socio econ	1 x 30	% Eng-popn	Media and Communications	Key brands	Top sports (played at least once a month) and sporting behaviour
	<b>Tim</b> Settling Down Males Also known as Simon, Jonathan, Jeremy, Adrian, Marcus	Sporty male professionals, buying a house and settling down with partner. <i>Professional, may have children, married or single.</i>	26-45	ABC1	62% 27%	8.8%	Tim's main source of information is the internet -he uses this for information on property, sports and managing his finances. He is a heavy mobile phone user and likes to access information 24/7. Tim will often buy things online and is relatively likely to use sms text alerts and 3G services.		Tim is an active type that takes part in sport on a regular basis. Tim's top sports are cycling (21%), keep fit/ gym (20%), swimming (15%), football (13%) and golf (7%)
	<b>Alison</b> Stay at Home Mums Also known as Justine, Karen, Suzanne, Tamsin, Siobhan	Mums with a comfortable, but busy, lifestyle. <i>Stay-at-home mum, children, married.</i>	36-45	ABC1	55% 20%	4.4%	Alison is a medium TV viewer and may have a digital package, but is unlikely to respond to TV advertising. She is a medium internet user and is unlikely to respond to internet advertising, but will use it as a source of information to aid her decision-making. She has a pay-as-you-go mobile for emergencies, but prefers to use her landline.		Alison is a fairly active segment with above average levels of participation in sport. Alison's top sports are: keep fit/ gym (27%), swimming (25%), cycling (12%), athletics including running (11%), and equestrian (3%)
	<b>Jackie</b> Middle England Mums Also known as Andrea, Cheryl, Deborah, Jane, Louise	Mums juggling work, family and finance. <i>Vocational job, may have children, married or single.</i>	36-45	C1C2 D	47% 16%	4.9%	Jackie is a medium TV viewer, enjoying soaps, chat shows and dramas, and has Freeview digital channels. She is a light and cautious internet user, but has been encouraged by her children's prolific usage and is becoming more confident herself		Jackie has above average participation levels in sport, but is less active than other segments in her age group. Jackie's top sports are keep fit/ gym (22%), swimming (20%), cycling (9%), athletics including running (6%), and badminton (2%).
	<b>Kev</b> Pub League Team Mates Also known as Lee, Craig, Steven, Tariq, Dariusz.	Blokes who enjoy pub league games and watching live sport. <i>Vocational job, may have children, married or single.</i>	36-45	DE	43% 17%	5.9%	Kev is a heavy TV viewer, likely to have a digital or cable package for extra sports coverage. He is a heavy radio listener and is likely to favour local commercial stations. Kev uses his mobile phone for social reasons but will not respond to text advert		Kev has above average levels of participation in sport. Kev's top sports are keep fit/ gym (14%), football (12%), cycling (11%), swimming (10%) and athletics including running (6%)
	<b>Paula</b> Stretched Single Mums Also known as Donna, Gemma, Shelley, Tina, Tammy	Single mums with financial pressures, childcare issues and little time for pleasure. <i>Job seeker or part time low skilled worker, children, single.</i>	26-45	DE	36% 13%	3.7%	Paula is a heavy TV viewer, enjoying quiz and chat shows, reality TV and soaps. She is likely to have a digital or cable package. Paula does not have internet access at home, and is a heavy mobile phone user, although this is likely to be pay-as-you-go		Paula is not a very active type and her participation is lower than that of the general adult population. Paula's top sports are keep fit/ gym (18%), swimming (17%), cycling (5%), athletics including running (4%) and football (3%)
	<b>Philip</b> Comfortable Mid Life Male Also known as Graham, Colin, Keith, Stuart, Clive	Mid-life professional, sporty males with older children and more time for themselves. <i>Full time job and owner occupied, children, married.</i>	46-55	ABC1	51% 20%	8.7%	Philip is a medium TV viewer, likely to have digital and use interactive services for sports and business news. He is a heavy radio listener. Philip is comfortable purchasing over the phone and internet, but is unlikely to respond to sms text alerts		Philip's sporting activity levels are above the national average. Philip's top sports are cycling (16%), keep fit/ gym (15%), swimming (12%), football (9%), and golf (8%)



# SUNDERLAND BUILT LEISURE AND SPORTS STRATEGIC NEEDS ASSESSMENT DRAFT REPORT

	Segment name and description	Segment characteristics	Main age band	Socio econ	1 x 30	% Eng-popn	Media and Communications	Key brands	Top sports (played at least once a month) and sporting behaviour
	<b>Elaine</b> Empty Nest Career Ladies  Also known as Carole, Sandra, Penelope, Julie, Jacqueline	Mid-life professionals who have more time for themselves since their children left home. <i>Full time job and owner occupied, married.</i>	46-55	ABC1	43%	6.1%	Philip is a medium TV viewer, likely to have digital and use interactive services for sports and business news. He is a heavy radio listener. Philip is comfortable purchasing over the phone and internet, but is unlikely to respond to sms text alerts		Elaine's sporting activity levels are similar to the national average. Elaine's top sports are keep fit/ gym (21%), swimming (18%), cycling (7%), athletics including running (3%) and tennis (2%).
					12%				
	<b>Roger &amp; Joy</b> Early Retirement Couples  Also known as Melvyn, Barry, Geoffrey, Linda, Susan, Patricia	Free-time couples nearing the end of their careers <i>Full-time job or retired, married.</i>	56-65	ABC1	38%	6.8%	Roger and Joy are medium TV viewers and heavy radio listeners. They regularly read the Times of Daily Telegraph, and a local paper. They have increased their use of the internet and may now have access to it at home.		Roger and Joy are slightly less active than the general population. Roger and Joy's top sports are keep fit/ gym (13%), swimming (13%), cycling (8%), golf (6%), and angling (2%)
					10%				
	<b>Brenda</b> Older Working Women  Also known as Shirley, June, Maureen, Janet, Diane	Middle aged ladies, working to make ends meet <i>Part-time job, married.</i>	46-65	C2DE	29%	4.9%	Brenda is a heavy TV viewer and is likely to respond to TV advertising. She is a medium radio listener, preferring local commercial stations. Brenda rarely has access to the internet, and is an infrequent mobile user. She enjoys reading the Mirror or the Sun.		Brenda is generally less active than the average adult. Brenda's top sports are keep fit/ gym (15%), swimming (13%), cycling (4%), athletics including running (2%) and badminton (1%)
					8%				
	<b>Terry</b> Local 'Old Boys'  Also known as Derek, Brian, Malcolm, Raymond, Michael	Generally inactive older men, low income, little provision for retirement. <i>Job Seeker, married or single.</i>	56-65	DE	26%	3.7%	Terry is a high TV viewer, both at home and in the pub, particularly enjoying live sports coverage. He reads the tabloids on a daily basis. Terry does not use the internet, and does not feel he is missing out. He is unlikely to have a mobile phone.		Terry is generally less active than the average adult. Terry's top sports are keep fit/ gym (8%), swimming (6%), cycling (6%), angling (4%), and golf (4%).
					9%				
	<b>Norma</b> Late Life Ladies  Also known as Pauline, Angela, Irene, Denise, Jean	Older ladies, recently retired with a basic income to enjoy their lifestyles. <i>Job seeker or retired, single.</i>	56-65	DE	23%	2.1%	Norma is a high TV viewer, enjoying quiz shows, chat shows, soaps and religious programmes. Most new technology has passed her by, having no internet access or mobile phone, but she uses her landline to call her family.		Norma is generally less active than the average adult. Norma's top sports are keep fit/ gym (12%), swimming (10%), cycling (2%), bowls (1%) and martial arts/ combat (1%).
					6%				
	<b>Ralph &amp; Phyllis</b> Comfortable Retired Couples  Also known as Lionel, Arthur, Reginald, Beryl, Peggy, Marjorie	Retired couples, enjoying active and comfortable lifestyles. <i>Retired, married or single.</i>	66+	ABC1	28%	4.2%	Ralph and Phyllis are medium to light TV viewers, preferring to be out and about instead. They are unlikely to have access to the internet, although it is something they are considering. They read the newspaper daily: either the Daily Telegraph or Times.		Ralph and Phyllis are less active than the average adult, but sportier than other segments of the same age group. Ralph and Phyllis' top sports are keep fit/ gym (10%), swimming (9%), golf (7%), bowls (4%), and cycling (4%).
					9%				

# SUNDERLAND BUILT LEISURE AND SPORTS STRATEGIC NEEDS ASSESSMENT DRAFT REPORT

	Segment name and description	Segment characteristics	Main age band	Socio econ	1 x 30	% Eng-popn	Media and Communications	Key brands	Top sports (played at least once a month) and sporting behaviour
	<b>Frank</b> Twilight Years Gent  Also known as Roy, Harold, Stanley, Alfred, Percy	Retired men with some pension provision and limited exercise opportunities. <i>Retired, married or single.</i>	66+	C1C2 D	21%	4.0%	Frank is a heavy TV viewer and enjoys watching live sport and notices TV advertising, which he is influenced by. He does not use the internet and is nervous of computers. Frank reads a newspaper most days, either the Daily Mail or Express. He does not have a mobile phone		Frank is generally much less active than the average adult. Frank's top sports are golf (7%), keep fit/ gym (6%), bowls (6%), swimming (6%) and cycling (4%).
					9%				
	<b>Elsie &amp; Arnold</b> Retirement Home Singles  Also known as Doris, Ethel, Gladys, Stanley, Walter, Harold	Retired singles or widowers, predominantly female, living in sheltered accommodation. <i>Retired, widowed.</i>	66+	DE	17%	8.0%	Elsie and Arnold are heavy TV viewers, enjoying quiz shows, religious programmes and old films. They generally do not have access to the internet or use a mobile phone, and only use their landline to call family		Elsie and Arnold are much less active than the average adult. Their top sports are keep fit/ gym (10%), swimming (7%), bowls (3%), golf (1%) and cycling (1%).
					5%				



## SUNDERLAND BUILT LEISURE AND SPORTS STRATEGIC NEEDS ASSESSMENT DRAFT REPORT

Name of Facility	No. of Courts	Year Built	Year Refurb	Weight Factor	Management Weighting	Hrs in Peak Period	Total Community Hours	Facility Capacity - vpwpp*	% of Capacity used	Annual Throughput
<b>Sunderland</b>								20,433	73%	984347
ACADEMY 360	4	2009		49%	L	13.0	16.0	312	100%	18163
BARNWELL PRIMARY SCHOOL	3	2006		48%	L	10.0	10.0	180	100%	9180
BIDDICK SCHOOL SPORTS COLLEGE	4	1985	2006	45%	L	29.5	36.0	708	50%	20566
CASTLE VIEW SPORTS CENTRE	4	1997		45%	L	43.0	46.0	1,729	60%	55069
FARRINGDON COMMUNITY SPORTS COLLEGE	4	1985		38%	L	23.5	24.0	987	81%	41325
HOUGHTON KEPIER SPORTS COLLEGE	4	1993	2011	48%	L	23.5	25.0	945	75%	37354
HOUGHTON SPORTS COMPLEX	3	1984		69%	H	40.5	75.0	1,395	100%	109342
LAMBTON STREET YOUTH CENTRE	3	2002		93%	H	20.3	42.8	365	100%	31249
MONKWEARMOUTH SCHOOL SPORTS CENTRE	8	1975	2012	45%	L	22.0	22.5	1,799	36%	33928
OXCLOSE COMMUNITY SCHOOL	4	1974	2010	44%	L	37.0	39.0	1,970	55%	57095
RED HOUSE ACADEMY	4	2002		47%	L	20.0	20.0	480	63%	15372
SANS STREET YOUTH AND COMMUNITY CENTRE	3	1969	2007	79%	H	25.0	60.0	450	100%	42643
SEABURN CENTRE	4	1989	1998	79%	H	36.5	59.0	1,752	66%	81200
ST AIDENS ROMAN CATHOLIC SCHOOL	4	1960	2003	34%	L	20.0	20.0	480	85%	20801
ST ROBERT OF NEWMINSTER SCHOOL	4	1972		30%	L	17.5	17.5	874	45%	19957
SUNDERLAND HIGH SCHOOL - JUNIOR SCHOOL	4	1994		43%	L	15.0	15.0	360	91%	16662
THORNHILL SCHOOL	4	2006		48%	L	20.0	20.0	1,556	100%	79376
UNIVERSITY OF SUNDERLAND CITY SPACE	6	2009		49%	L	43.0	97.0	1,548	100%	139714
WASHINGTON LEISURE CENTRE	4	2015		100%	H	43.0	98.0	1,032	100%	93893
WASHINGTON SECONDARY SCHOOL	4	2009		49%	L	20.0	20.0	480	74%	18077
WEAR SIDE HEALTH & RACQUETS CLUB	4	1998		89%	H	43.0	116.0	1,032	40%	43383

The above table is an extract from Sport England's Facility Planning Model 2014