

Appendix B

Leisure Centre Provision in the West

‘Desktop’ Market Analysis

February 2018



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Introduction

This desk top market analysis supports the options appraisal of leisure centre facilities in the western areas of Newark and Sherwood. It considers population masses in the west of the district and identifies locations which have the largest number of potential customers within a 20-minute drive time (after which it has been shown that customers are not likely to travel to use a facility). The market analysis then reviews local population factors which influence a preferred location of leisure facilities, such as health indicators, Sport England profiles and considers the wider strategic developments and master planning taking place in the west of the district.

The west of the district comprises of seven wards (Bilsthorpe; Boughton; Edwinstowe and Clipstone; Farnsfield; Ollerton; Rainworth North and Rufford; and Rainworth South and Blidworth) and borders Ashfield; Bassetlaw and Mansfield. The western wards include several mining towns, villages and large areas of woodland, which form part of Sherwood Forest.

Population

The population of Newark and Sherwood is 119,600 (LG Inform Plus, 2015), with the areas in the west of the district accounting for 34% of the total population (approx. 40,862). The top five populous centres in the west are:

- Ollerton and Boughton: 10,292
- Rainworth: 6,674
- Edwinstowe: 5,207
- Clipstone: 4,674
- Blidworth: 4,473

Source: Population by Parish, LG Inform Plus, 2015

The population figures calculated by parish highlight that Ollerton and Boughton has the highest population mass in the west of the district. The population projection contained in the Boundary Review in 2012 indicates that the electorate is likely to increase by 6% by 2021 in the west of the district. It should be noted that this projection discounts residents who have not registered to vote, not entitled to vote, or are not of voting age. However, it does give an indication of the level of population growth in the area and provides a conservative estimate for the population of approximately 42,000 in the west of the district by 2021.

Housing Growth

The Council's Allocations & Development Management Development Plan Document (A&DM DPD) adopted in 2013 sets out allocations of land for new housing, employment and other development. In the west of the district, significant housing growth has been directed to this area:-

- Ollerton & Boughton is defined as a service centre and the Core Strategy directs 8% of the district's housing growth to this area. This equates to a need to provide 1133 dwellings in this settlement between 2006 and 2026. There is a residual requirement for the A&DM DPD to identify sites that are capable of delivering 487 new dwellings in Ollerton & Boughton.
- Clipstone is defined as a service centre and the Core Strategy directs 6% of the district's housing growth to this area. This equates to a need to provide 850 dwellings in this settlement between 2006 and 2026. There is a residual requirement for the A&DM DPD to identify sites that are capable of delivering 104 new dwellings in Clipstone.
- Rainworth is defined as a Service Centre and directs 3% of the district's housing growth to this area. This equates to a need to provide 425 dwellings in this settlement between 2006 and 2026. There is a residual requirement for the A&DM DPD to identify sites that are capable of delivering 247 new dwellings in Rainworth.
- Blidworth is defined as principal village and the Core Strategy directs 2.5% of the district's housing growth to this area. This equates to a need to provide 354 dwellings in this settlement between 2006 and 2026. There is a residual requirement for the A&DM DPD to identify sites that are capable of delivering 299 new dwellings in Blidworth.
- Edwinstowe was defined as a principle village in the Core Strategy which directs 2% of the district's housing growth to this area. This equates to a need to provide 283 dwellings in this settlement between 2006 and 2026. There is a residual requirement for the A&DM DPD to identify sites that are capable of delivering 121 new dwellings in Edwinstowe. In July 2017, Edwinstowe was redefined as a Service Centre, due to developments and growth due to take place in Thoresby.
- Farnsfield is defined as principal village and the Core Strategy directs 1% of the district's housing growth to this area. This equates to a need to provide 142 dwellings in this settlement between 2006 and 2026. There is however a residual requirement for the A&DM DPD to identify sites that are capable of delivering 105 new dwellings in Farnsfield.

The A&DM DPD has directed the largest proportion of housing growth in the western wards to the area of Ollerton and Boughton and this doesn't not include windfall sites. Ollerton & Boughton acts as a service centre to a large local population, both in the town and the surrounding area. Over the plan period it is anticipated that the town will see the provision of new housing, employment and associated facilities that will help regenerate the area and reinforce its role as the main centre within the area.

Health

In comparison to the national average, life expectancy in the west of the district is significantly lower compared to other areas in the district. In Ollerton specifically, life expectancy is 80.9 years for females and 77.6 years for males compared with 88.2 years for females in Muskham and 84.6 years in Sutton on Trent for males (LG Inform Plus, 2015).

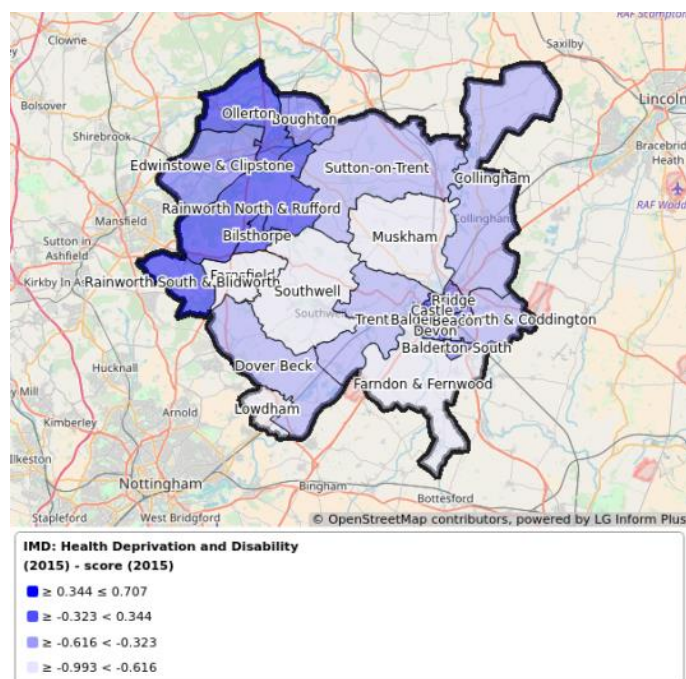
Approximately 20% of the population in the district lives with a long-term illness (e.g. diabetes). This is higher than the England average (18%) and is strongly correlated with the old mining communities in the north-west of the area. Rainworth South and Blidworth has the highest % of the population living with a long term illness or disability (27%), followed by Ollerton (25.9%), (LG Inform Plus, 2011).

Excessive weight in Adults indicates that 66.7% of Adults in the district were obese in 2015/16 compared to the national average of 61.3% nationally and 63.7% in the East Midlands (Public Health England, 2018). However in children, obesity rates are higher than the national average. 19.7 % of year 6 children (10 to 11 year olds) were classified as obese in Ollerton (LG Inform Plus, 2011) which is higher than the national average of 19%.

Deprivation

The district has 6 wards that rank the highest score for Indices of Multiple deprivation (IMD) Health deprivation and disability. Four are located in the west of the district:

- Ollerton 0.707
- Rainworth South & Blidworth 0.691
- Bilsthorpe 0.656
- Rainworth North & Rufford 0.344



Source: Indices of multiple deprivation, LG Inform Plus, 2015

Ollerton is ranking as the highest area for health deprivation and disability in the west with Rainworth South & Blidworth ranking second. Boughton; Edwinstowe & Clipstone and Farnsfield rank lower in the indices of multiple deprivation (IMD) Health deprivation and Disability.

The Nottinghamshire Joint Strategic Needs Assessment (JSNA): Child Poverty 2016 undertaken by Nottinghamshire County Council identifies 8 wards in Newark and Sherwood that are identified as target wards where child poverty levels exceed the national figure of 18%. In the west of the district, there are 4 areas that exceed this target for areas with high levels of child poverty:

- Boughton 31.0%
- Blidworth 23.5%
- Ollerton 20.9%
- Clipstone 20.2%

Edwinstowe, Rainworth and Farnsfield are areas that have lower levels of child poverty. In addition, the JSNA further identifies areas where over 30% of children live in poverty as hotspots, in the west of the district, Boughton Ward is identified as a hotspot (31%).

Transport and Connectivity

There are reasonable bus services throughout the West of the district, however for small villages buses tend to be infrequent. Most of the services are hourly and origins/destinations are the main towns of Newark, Mansfield, Retford and Nottingham, with the majority of services passing through Ollerton. Public transport from the North to the South of the western wards is difficult and would normally require two journeys, going via Southwell or Mansfield. There are no Motorways within the area; however there are three primary A roads which pass through the western wards:

- A614 travelling North to South
- A616 travelling East to west in the North
- A617 travelling East to west in the South of the area



Drive and Walk Times

Sport England recommends that a 20 minute drive time is the maximum time that individuals would be willing to spend travelling to access leisure facilities. The tables and maps below indicate the population and number of household’s within a 20 minute drive time and 8 minute walk time of the three leisure centres in the west where currently Council leisure facilities are provided (Dukeries Leisure Centre – dryside only; South Forest Leisure Complex – privately owned leisure complex where Active4Today has provided wetside provision since July 2016; Blidworth Leisure Centre– dryside only).

It is important to note that when reviewing this data, the population and households figures only include areas within the district, it does not include household or population data for areas that border the district, for example in Ollerton and Boughton, larger urban areas of Worksop and Retford would fall within a 20 minute drive time.

Dukeries Leisure Centre

Distance	Population	Households
8 minute walk time	3,621	1,417
20 minute drive time	46,715	19,182



Source: LG Inform Plus; Population (2015); Households (2011)

The current location of the Dukeries Leisure Centre indicates that all of the wards in the west and part of Sutton on Trent are within a 20 minute drive time. It also includes the largest population within an 8 minute walk time, which is important to help tackle

engagement of communities in need. It also encompasses approx. 47,000 of the population and approx. 19,000 households.

South Forest Leisure Complex (where wetside provision is currently provided)

Distance	Population	Households
8 minute walk time	973	442
20 minute drive time	40,862	16,758

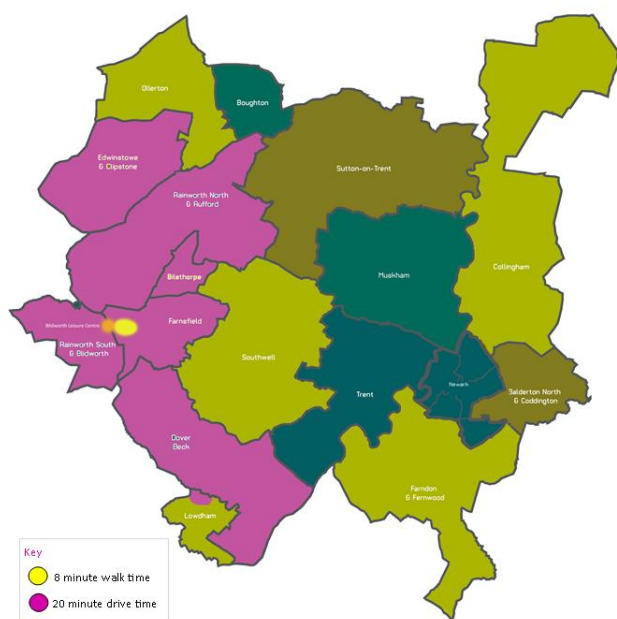


Source: LG Inform Plus; Population (2015); Households (2011)

The location of South Forest Leisure Centre covers all of the wards in the west of the district but encompasses far fewer population and households particularly within walking distance. This is considered a barrier for some households who would not have access to transport and would benefit from a leisure centre within walking distance.

Blidworth Leisure Centre

Distance	Population	Households
8 minute walk time	1,303	525
20 minute drive time	32,069	12,821

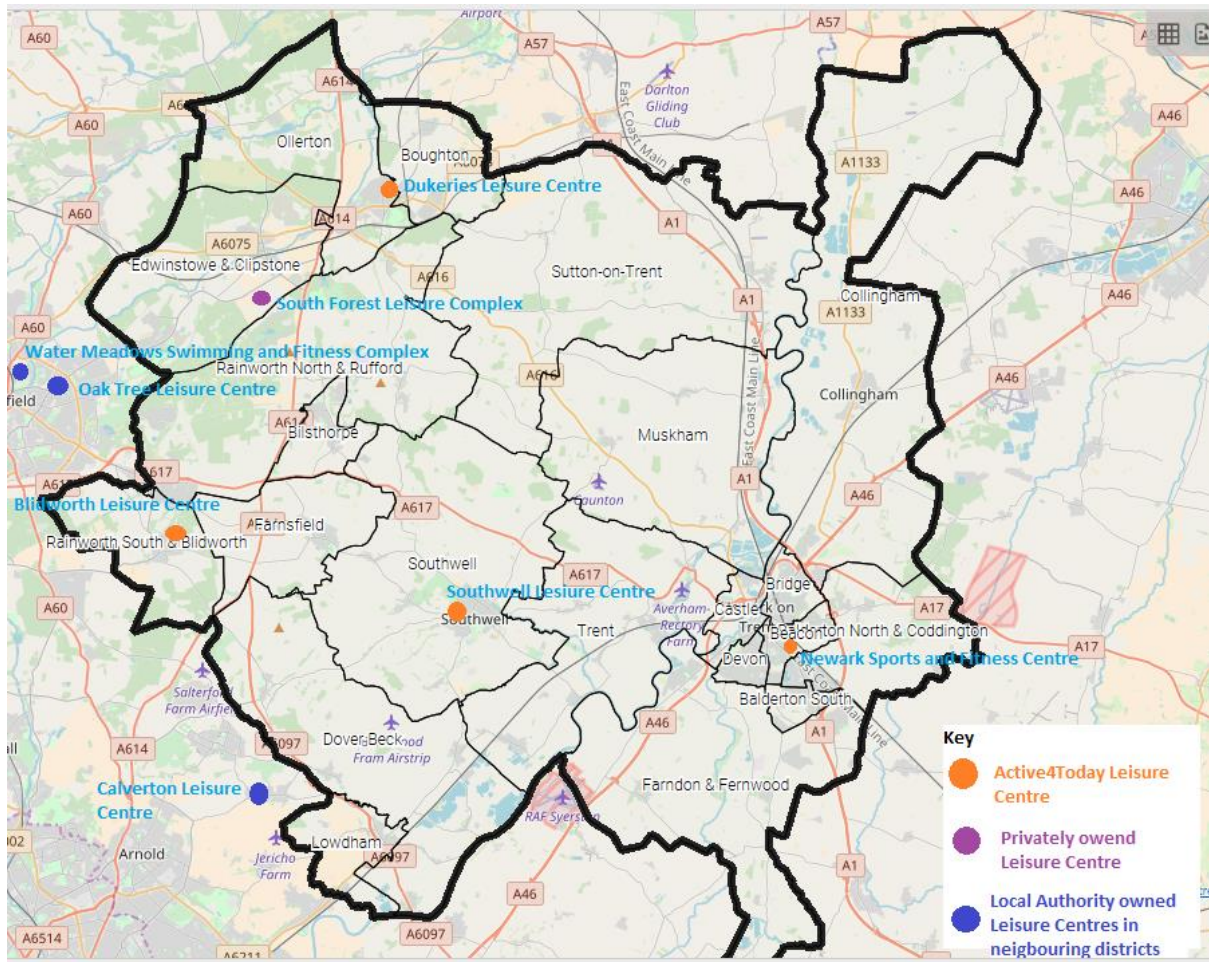


Source: LG Inform Plus; Population (2015); Households (2011)

The current location of Blidworth Leisure Centre does not cover the entire west of the district but it does include Dover Beck and Lowdham towards the South of the district. Blidworth Leisure Centre has the potential to reach approx. 32,000 of the population and approx. 13,000 households.

The tables and maps above indicate that the location of the Dukeries Leisure Centre in Ollerton and Boughton encompasses the largest population and number of households within an 8 minute walk time and a 20 minute drive time and therefore can reach the largest volume of residents for participation in sport and leisure. Whilst South Forest Leisure Complex also includes all of the western wards with a 20 minute drive time, it reaches slightly less households and population than the current Dukeries site.

There are also leisure facilities in neighbouring districts that would fall within a 20 minute drive time, where residents in our district could travel to. The nearest leisure facilities in the west of the district are indicated on the map below including leisure facilities in neighbouring districts.



Source: LG Inform Plus

As the map above indicates, Rainworth South and Blidworth; Rainworth North and Rufford and parts of Edwinstowe and Clipstone have local authority owned leisure centres within a 20 minute drive time that are located in neighbouring districts. It is also important to note that there a number of private providers offering leisure facilities in the west and in neighbouring towns.

Sport England Market Segmentation

Sport England (2014) identifies 19 ‘sporting’ market segments which includes profile types and their sporting habits. The most common profiles pertinent to the west of the district are typically for individuals aged between 16-64. The most popular participating sport which appears in the majority of the sport profiles is swimming which is indicated in the table below.

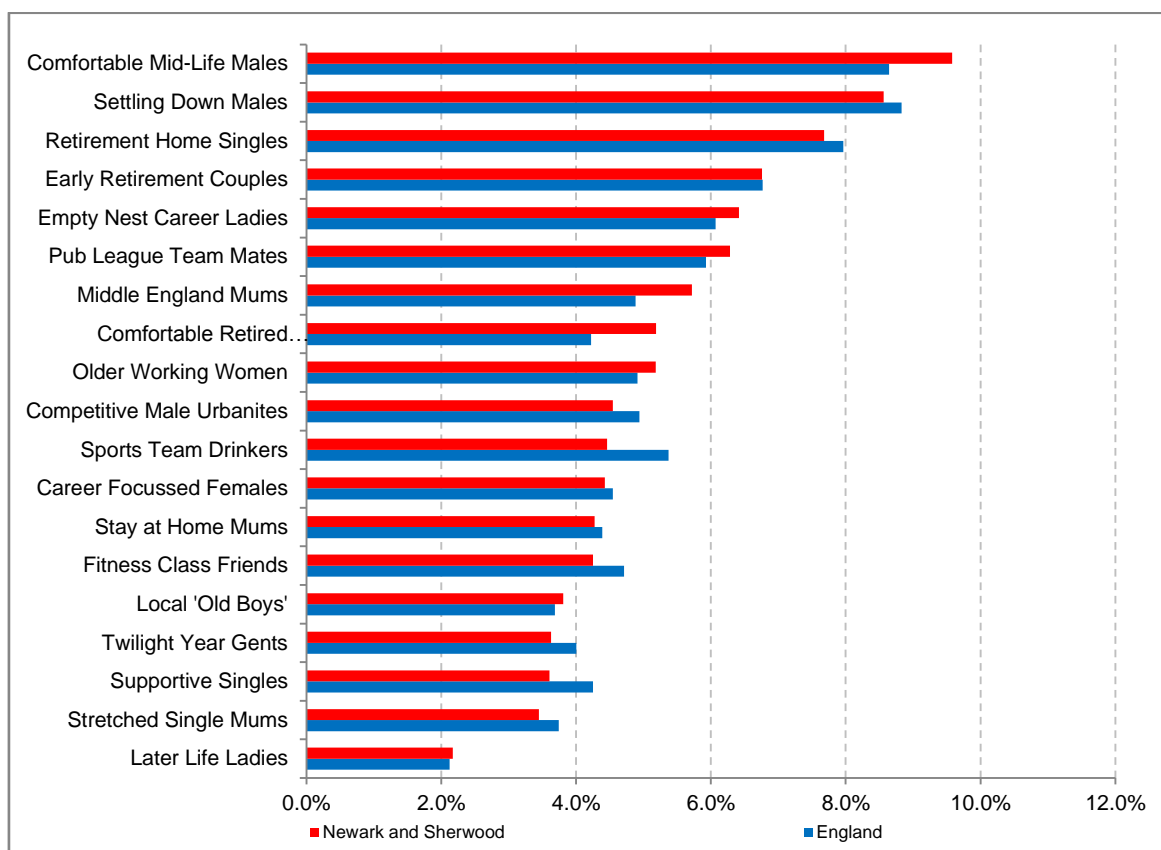
Name	Title	Description	Top three participating sports nationally
Ben	Competitive Male Urbanites	Male (aged 18-25), recent graduates, with a ‘work-hard, play-hard’ attitude. Most sporty of 19 segments.	Football (33%) Keep fit/gym (24%) Cycling (18%)
Jamie	Sports Team	Young blokes (aged 18-25) enjoying	Football (28%)

	Drinkers	football, pints and pool.	Keep fit/gym (22%) Athletics (12%)
Chloe	Fitness Class Friends	Young (aged 18-25) image-conscious females keeping fit and trim.	Keep fit/gym (28%) Swimming (24%) Athletics (14%)
Leanne	Supportive Singles	Young (aged 18-25) busy mums and their supportive college mates. Least active segment of her age group.	Keep fit/gym (23%) Swimming (18%) Athletics (9%)
Helena	Career Focused Females	Single professional women, enjoying life in the fast lane (aged 26-45).	Keep fit/gym (26%) Swimming (23%) Cycling (11%)
Tim	Settling Down Males	Sporty male professionals (aged 26-45), buying a house and settling down with partner.	Cycling (21%) Keep fit/gym (20%) Swimming (15%)
Alison	Stay at Home Mums	Mums with a comfortable, but busy, lifestyle (aged 36-45).	Keep fit/gym (27%) Swimming (25%) Cycling (12%)
Jackie	Middle England Mums	Mums (aged 36-45) juggling work, family and finance.	Keep fit/gym (27%) Swimming (20%) Cycling (9%)
Kev	Pub League Team Mates	Blokes (aged 36-45) who enjoy pub league games and watching live sport.	Keep fit/gym (14%) Football (12%) Cycling (11%)
Paula	Stretched Single Mums	Single mum (aged 26-45) with financial pressures, childcare issues and little time for pleasure.	Keep fit/gym (18%) Swimming (17%) Cycling (5%)
Philip	Comfortable Mid-Life Males	Mid-life professional (aged 46-55), sporty males with older children and more time for themselves.	Cycling (16%) Keep fit/gym (15%) Swimming (12%)
Elaine	Empty Nest Career Ladies	Mid-life professionals who have more time for themselves since their children left home (aged 46-55).	Keep fit/gym (21%) Swimming (18%) Cycling (7%)
Roger & Joy	Early Retirement Couples	Free-time couples nearing the end of their careers (aged 56-65).	Keep fit/gym (13%) Swimming (13%) Cycling (8%)
Brenda	Older Working Women	Middle aged ladies (aged 46-65), working to make ends meet.	Keep fit/gym (15%) Swimming (13%) Cycling (4%)
Terry	Local 'Old Boys'	Generally inactive older men (aged 56-65), low income and little provision for retirement.	Keep fit/gym (8%) Swimming (6%) Cycling (5%)
Norma	Later Life Ladies	Older ladies (aged 56-65), recently retired, with a basic income to enjoy their lifestyles.	Keep fit/gym (12%) Swimming (10%) Cycling (2%)
Ralph & Phyllis	Comfortable Retired	Retired couples (aged 66+), enjoying active and comfortable lifestyles.	Keep fit/gym (10%) Swimming (9%)

	Couples		Golf (7%)
Frank	Twilight Year Gents	Retired men (aged 66+) with some pension provision and limited sporting opportunities.	Golf (7%) Keep fit/gym (6%) Bowls (6%)
Elsie & Arnold	Retirement Home Singles	Retired singles or widowers (aged 66+), predominantly female, living in sheltered accommodation.	Keep fit/gym (10%) Swimming (7%) Bowls (3%)

Source: Market Segmentation, Sport England, 2014

The dominant market segments in Newark & Sherwood are identified in the bar chart below. Comfortable Mid-Life Males; Settling down males and Retirement Home Singles are the dominant profiles for the district. In addition, the dominant market segments nationally are also displayed as a means of comparison. For example, the segmentation profile for Newark & Sherwood indicates 'comfortable mid-life males' to be the largest segment of the adult population at 9.6%, compared to a national average of 8.6%.



Source: Dominant Market Segments (Sport England, 2014).

The three dominant profiles for the district indicate a range of top three nationally participating sports including swimming and keep fit/gym as popular sporting activities throughout all three profiles. Therefore, when considering leisure centre provision in the west, it would be sensible to have at least one centre that offered a full facility mix with both wetside and dryside provision.

Name	Title	Description	Top three participating sports nationally
Philip	Comfortable Mid-Life Males	Mid-life professional (aged 46-55), sporty males with older children and more time for themselves.	Cycling (16%) Keep fit/gym (15%) Swimming (12%)
Tim	Settling Down Males	Sporty male professionals (aged 26-45), buying a house and settling down with partner.	Cycling (21%) Keep fit/gym (20%) Swimming (15%)
Elsie & Arnold	Retirement Home Singles	Retired singles or widowers (aged 66+), predominantly female, living in sheltered accommodation.	Keep fit/gym (10%) Swimming (7%) Bowls (3%)

Strategic Developments

There are number of strategic developments progressing in the west of the district which are contributing to the development of the western wards. In particular, due to the needs of the area, Ollerton and Boughton has necessitated the need to progress a number of these strategic developments.

Ollerton and Boughton Neighbourhood Study

A comprehensive assessment of the Ollerton and Boughton area is currently being undertaken through a neighbourhood study. The neighbourhood study focuses on the socio-economic ('People') characteristics, the built environment ('Place') and the opportunities and challenges these bring. The intention is to create a locally driven document that provides all local stakeholders with a strategic and long-term plan to guide future decision making and investment requirements for this area.

'Planning for Real', who have undertaken the 'People' element of the neighbourhood study have prepared a draft People report which identified that the Dukeries Leisure Centre was under utilised from the surrounding housing estates and that the loss of the swimming pool from this site was a concern. Residents surveyed as part of the neighbourhood study expressed disappointment at the closure of the Swimming Pool and loss of swimming lessons for their children which meant travelling some distance and joining waiting lists. The draft People report suggests a long term high priority for the need for a new swimming pool at the Dukeries Leisure Centre.

The 'Place' element of the Ollerton and Boughton Neighbourhood study has been undertaken by urban designers URBED and surveyors AspinalVerdi who are considering options for a new housing development between the Hallam Road and Retford Road Estates. The draft report is attached as an **Appendix** and will be taken forward through a number of workshops.

One Public Estate (OPE)

The One Public Estate (OPE) programme is an established national programme delivered in partnership by the Cabinet Office Government Property Unit (GPU) and the Local Government Association (LGA). It provides practical and technical support and funding to councils to deliver ambitious property-focused programmes in collaboration with central government and other public sector partners. In the district, Ollerton and Boughton has secured funding from the OPE programme and work is underway to establish a unique public services 'hub' at the centre of the community, aims to improve health deprivation and will include co-location with the CCG. ARCADIS, the consultants are currently undertaking a feasibility study.

Community Sporting Infrastructure Improvements

The District Council have been working with Ollerton and Boughton Town Council to consolidate the sporting infrastructure at the Walesby Lane site and linking this to the Open Space proposals at Petersmith Drive. This will create a larger more flexible outdoor sporting space to increase opportunity for physical activity and associated health benefits. The District Council has been working with the Football Association and Football Foundation to secure monies for facility improvements and s106 monies has also been attributed to this project.

Other Strategic Drivers

Getting Active Together Nottinghamshire Strategy

Active Notts (formerly Sport Nottinghamshire) has been leading on the development of a Nottinghamshire and Nottingham City Physical Activity and Sport Strategy: - Getting Active Together Nottinghamshire. The strategy will be finalised in early 2018 following consultation on the final draft document. The strategy vision and priorities have been developed with a range of partners across the public, private, community and voluntary sector. The final draft vision for the strategy is:

“to make physical activity the norm for the people who live and work in our communities by ensuring everyone can easily take part, volunteer and engage in sport and activity as part of their everyday life”.

To achieve this vision, the draft strategy sets out the need to change the culture and system that exists for physical activity based on insight into the barriers and motivations of people that are the least active in our communities.

It is intended to refresh the Council’s Sports and Recreational Facilities Improvement Plan 2014-2017 and Sport and Physical Activity Development Plan 201-017, once the Nottinghamshire wide strategy has been finalised, linking into the Councils Strategic priorities.

Strategic Priorities

The Council has four Strategic Priorities for 2016-2020, and one of the priorities focuses on Healthiness. The Healthiness strategic priority defines the Council’s commitment to encourage and support wellbeing and healthier lifestyles of the communities within Newark and Sherwood. The two ambitions for this priority are:-

1. Increase participation in leisure and wellbeing activities in the district
2. Support health promotion and illness prevention activities in Newark and Sherwood

Conclusion

This market analysis draws conclusions throughout, around the future location of a leisure centre and the provision of this facility in the west of the district. When considering the location of a leisure facility, this market analysis determines that the most appropriate place would be in Ollerton and Boughton. Ollerton and Boughton has the highest population mass in the west, the largest housing growth (in the west), directed to this area, and has a number of strategic development progressing. Ollerton in particular, has the highest child obesity levels, highest indices of deprivation and a significantly lower life expectancy when compared with other parts of the district and nationally. The drive times data suggests that the highest proportion of the population and largest number of households that would have access to a reasonable drive time and walk time would be from the current Dukeries site in Ollerton and Boughton. Taking into account the map of the district and leisure facilities currently located within our district or neighbouring areas within a 20 minute drive time, Ollerton and Boughton would be the area that should retain a leisure facility in the vicinity, as there is currently not a nearby local authority owned facility in the vicinity.

When reviewing provision of leisure facilities in the west, this market analysis determines that a facility offering wetside provision is vital. As indicated by the Sport England market segmentation earlier in this analysis, swimming is one of the most popular activities for the sport profiles in the district. Currently, there is not a council owned leisure facility that offers swimming, therefore it would be important to provide wetside from a facility offering a full facility mix (dryside and wetside). The Ollerton and Boughton neighbourhood study determines that swimming provision should be re-provided at the current Dukeries site as it is a concern for local residents.

In conclusion, Ollerton and Bougton is the most suitable location for a leisure facility and this leisure provision should include a site with a full facility mix (dryside and wetside). Taking into account, the drive times which have been drawn from the current Dukeries site, which indicates the largest population mass would be from this current location and the comments from residents in the recent neighbourhood study, it would be sensible to determine that the leisure facility should remain at the current Dukeries Leisure Centre and that better use be made of this Council asset with the re-provision of swimming facilities with a fun element to help tackle engagement with communities.

Appendix Place Report – Ollerton & Boughton Neighbourhood Study



Place Report -
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