

APPENDIX B – SUPPLY AND DEMAND ASSESSMENT

PROJECT:	Babergh and Mid Suffolk District Councils Leisure, Sport and Physical Activity Strategy Update
SUBJECT:	Supply and Demand Assessment – Core Leisure Facilities
DATE:	14/05/21

1. Introduction

- 1.1 An updated supply and demand assessment has been undertaken for each of the local authority area to provide an indication of the balance of supply and demand for key areas of indoor sport and physical activity provision in each district as a whole.
- 1.2 Assessments for each of the types of provision listed below have been undertaken based on population and demographic data for each district currently (2019)¹ and in the future (2036)².
 - Health and fitness (gyms)
 - General Swimming
 - Swimming Lessons
 - Sports halls.
- 1.3 The assessment for health and fitness, general swimming and swimming lessons are based on SLC's latest methodologies and most up to date participation rate assumptions. The methodologies used have changed in some respects from those used in the previous Facilities Strategy work undertaken for the Councils, so the findings are not directly comparable with previous results. The main changes are summarised below:
 - Health and fitness – demand levels based on updated age-based participation rates with socio-economic and ethnicity-based sensitivity factors applied.
 - General swimming – demand levels based on updated participation rates with socio-economic and ethnicity-based sensitivity factors applied. Model considers demand in the peak period against capacity of existing provision in the peak period (rather than current / assumed usage levels)
 - Swimming lessons – demand levels based on updated participation rates with socio-economic and ethnicity-based sensitivity factors applied.
- 1.4 An up-to-date audit of supply has also been used to inform the assessments. The key findings of the assessment in terms of the balance of supply and demand for these key types of provision are summarised in this section for each local authority area. It should be noted that these assessments exclusively consider supply and demand within each district and do not take account of imported or export demand.

¹ Office of National Statistics Mid-Year Estimates

² Office of National Statistics Population Projections

2. Babergh

- 2.1 Based on 2019 mid-year estimates, Babergh has a population of 92,036 people which will increase to 99,442 by 2036. The demand generated by this population, taking into account demographic factors including age, ethnicity and socio-economic status has been compared with existing levels of supply in the district.

Health and Fitness

- 2.2 Nine health and fitness facilities with community access (pay and play or membership access) have been identified within the district with a total of 331 stations between them. The location of the facilities relative to population density across the district currently is shown in Figure 1. Facilities are concentrated around the areas of highest population density as would be expected, with some limited provision available in more rural areas in the centre and south east. There is no provision within the district north of Sudbury.

Figure 1: Health and Fitness Provision in Babergh



	Site Name	Stations	Access Type
1	GREAT CORNARD SPORTS CENTRE	35	Pay and Play
2	HADLEIGH POOL & LEISURE	35	Registered Membership use
3	HOLBROOK ACADEMY	21	Registered Membership use
4	KERSEY MILL HEALTH & FITNESS	20	Pay and Play

	Site Name	Stations	Access Type
5	KINGFISHER LEISURE CENTRE (SUDBURY)	100	Pay and Play
6	PEAKE FITNESS AT THE STOKE BY NAYLAND CLUB	37	Registered Membership use
7	SUDBURY SPORTS CENTRE	15	Pay and Play
8	YOU FIT HEALTH CLUB (IPSWICH) Ex Sprit HC.	18	Registered Membership use
9	ZEST HEALTH AND FITNESS	50	Registered Membership use

- 2.3 The findings of the health and fitness assessment for Babergh are shown in Table 1. This shows an undersupply currently of c. 81 stations increasing to 99 stations in 2036.

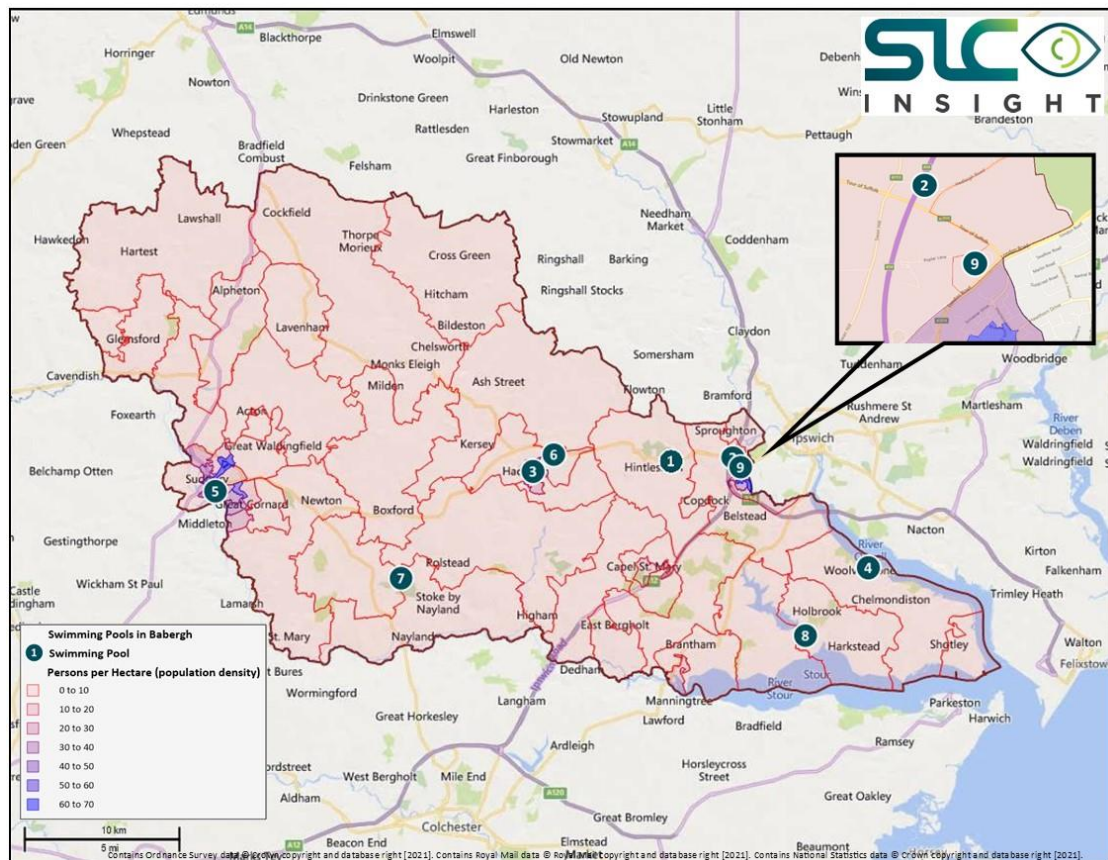
Table 1: Health and Fitness Supply and Demand Assessment - Babergh

Health & Fitness	2019	2036
Total Population	92,036	99,443
Demand (potential Members)	9,065	9,463
Total Supply (stations)	331	
Satisfied Demand (Members - actuals and benchmarked estimates)	7,282	
Unsatisfied Demand (Members)	1,783	2,181
Unsatisfied Demand (Stations)	81	99
* Negative is oversupply / Positive is undersupply		

General Swimming

- 2.4 Nine indoor swimming facilities six of which provide some form of community access (pay and play or membership access) have been identified within the district with a total water space of 1,186.5 sqm between them. The other 3 shown (Ipswich High School, Letts Swim and Royal Hospital School Holbrook) are available for private hire or club sessions and host swimming lesson providers.
- 2.5 The location of the facilities relative to population density across the district currently is shown in Figure 2. Similar to health and fitness provision, facilities are concentrated around the areas of highest population density, with some limited provision available in more rural areas in the centre and south east and no provision within the district north of Sudbury.

Figure 2: Indoor Swimming Provision in Babergh



	Site Name	Area	Access Type
1	BIRCH FARM COMPLEX	70	Pay and Play
2	FIRST STROKES SWIM SCHOOL IPSWICH	126	Pay and Play
3	HADLEIGH POOL & LEISURE	262.5	Pay and Play
4	IPSWICH HIGH SCHOOL	300	Sports Club / Community Association
5	KINGFISHER LEISURE CENTRE (SUDBURY)	500	Pay and Play
6	LETTS SWIM	62.5	Private hire
7	PEAKE FITNESS AT THE STOKE BY NAYLAND CLUB	108	Registered Membership use
8	ROYAL HOSPITAL SCHOOL HOLBROOK	522	Sports Club / Community Association
9	YOU FIT HEALTH CLUB (IPSWICH)	120	Registered Membership use

- 2.6 The findings of the general swimming supply and demand assessment for Babergh are shown in Table 2. This shows an oversupply currently of c. 817 SQM of water space and an undersupply of 815 SQM in 2036. This is based on the estimated capacity during peak times across all of the facilities against estimated peak time demand.

Table 2: General Swimming Supply and Demand Assessment - Babergh

Latent Demand General Swimming	2019	2036
Total Population	92,036	99,443
Demand (weekly swimming participants)	5,497	5,512
Total Supply (SQM)	2008	
Satisfied Demand (weekly swimming participants - actuals and benchmarked estimates)	12,574	
Unsatisfied Demand (weekly swimming participants)	-7,077	-7,062
Unsatisfied Demand (SQM)	-817	-815
* Negative is oversupply / Positive is undersupply		

Swimming Lessons

- 2.7 Based on desktop research, 8 of the facilities shown in Figure 2 have swimming lesson sessions as part of their programming. The capacity of current swimming lesson programmes at each facility have been estimated based on available information and desktop research.
- 2.8 The findings of the supply and demand assessment for swimming lesson provision in Babergh are summarised in Table 3. This shows an oversupply of provision across the district equivalent to 790 pupils currently and 989 pupils in 2036.

Table 3: Swimming Lessons Supply and Demand Assessment – Babergh

Latent demand Swimming Lessons	2019	2036
Total Population	92,036	99,443
Demand (pupils)	2,567	2,368
Satisfied Demand (pupils - actuals and benchmarked estimates)	3,357	
Unsatisfied Demand (pupils)	-790	-989
* Negative is oversupply / Positive is undersupply		

Sports Halls

2.9 Fourteen sports halls with some form of public access across eight sites have been identified in Babergh. Of these, eight halls are of 3 badminton court size or greater. There are a total of 44 courts across the fourteen halls, 38 courts if only the 3+ badminton court halls are included. The distribution of these facilities relative to population density is shown in

2.10 Figure 3.

Figure 3: Sports Hall Provision in Babergh



	Site Name	Courts	Access Type
1	EAST BERGHOLT HIGH SCHOOL & SPORTS CENTRE	4	Pay and Play
		1	Pay and Play
2	GREAT CORNARD SPORTS CENTRE	5	Sports Club / Community Association
		1	Sports Club / Community Association
3	HADLEIGH HIGH SCHOOL	4	Sports Club / Community Association
		1	Sports Club / Community Association
4	HOLBROOK ACADEMY	4	Sports Club / Community Association
		1	Sports Club / Community Association
		1	Sports Club / Community Association
5	IPSWICH HIGH SCHOOL	5	Sports Club / Community Association
6	ROYAL HOSPITAL SCHOOL HOLBROOK	5	Sports Club / Community Association
7	SUDBURY SPORTS CENTRE	5	Sports Club / Community Association
		1	Sports Club / Community Association
8	SUFFOLK ONE	6	Sports Club / Community Association

- 2.11 An assessment of supply and demand for sports hall provision based on the 2019 and 2036 population of Babergh has been undertaken using Sport England's Sports Facility Calculator. The Sports Facility Calculator can help to quantify the demand generated by a population for key community sports facilities.
- 2.12 Based on the 2019 population and demographics, the population of Babergh generates demand for 24.19 badminton courts. – equivalent to 6.05 4-court halls. In 2036, this increases to 24.79 badminton courts or 6.2 4-court halls. This suggests there is a significant current and future oversupply of sports hall provision in the district.

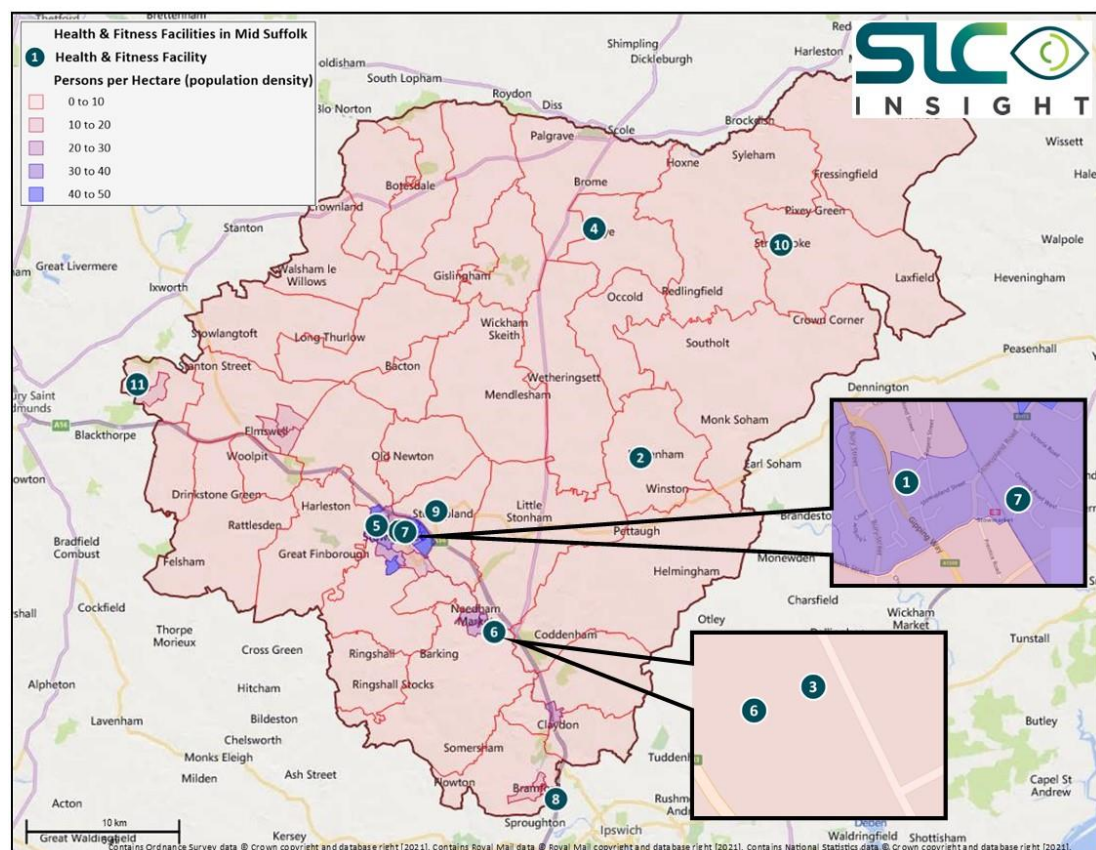
3. Mid Suffolk

- 3.1 Based on 2019 mid-year estimates, Mid Suffolk has a population of 103,895 people which will increase to 112,973 by 2036. The demand generated by this population, taking into account demographic factors including age, ethnicity and socio-economic status has been compared with existing levels of supply in the district.

Health and Fitness

- 3.2 Eleven health and fitness facilities with community access (pay and play or membership access) have been identified within the district with a total of 485 stations between them. The location of the facilities relative to population density across the district currently is shown in **Figure 4**. Facilities are concentrated around the areas of highest population density as would be expected, with some limited provision available in more rural areas to the north and east.

Figure 4: Health & Fitness Provision in Mid Suffolk



	Site Name	Stations	Access Type
1	BODYWIZE	47	Registered Membership use
2	DEBENHAM SPORTS AND LEISURE	32	Pay and Play
3	EDT GYM	26	Registered Membership use
4	HARTISMERE SPORTS CENTRE	16	Pay and Play

	Site Name	Stations	Access Type
5	MID SUFFOLK LEISURE CENTRE	100	Pay and Play
6	NEEDHAM GYM & FITNESS	47	Pay and Play
7	NRG FITNESS GYM	60	Registered Membership use
8	RIVERHILLS HEALTH CLUB AND BOUTIQUE SPA	85	Registered Membership use
9	STOWUPLAND SPORTS CENTRE	19	Registered Membership use
10	STRADBROKE SWIM AND FITNESS CENTRE	33	Pay and Play
11	THURSTON SPORTS EDUCATION CENTRE	20	Pay and Play

- 3.3 The findings of the health and fitness assessment for Mid Suffolk are shown in Table 4. This shows an oversupply currently of c. 7 stations and an undersupply of 18 stations in 2036. This suggests that supply and demand are broadly in balance.

Table 4: Health & Fitness Supply and Demand Assessment – Mid Suffolk

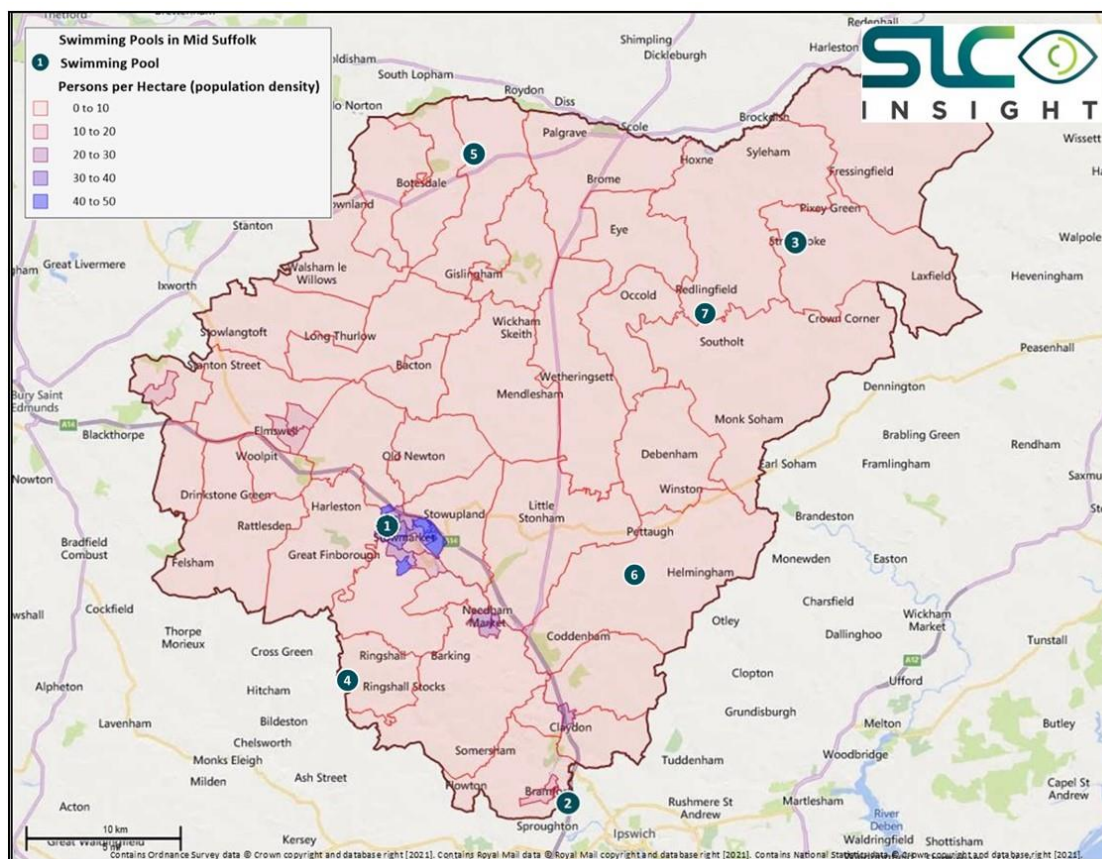
Latent demand Health & Fitness	2019	2036
Total Population	103,895	112,973
Demand (potential Members)	10,513	11,065
Total Supply (stations)	485	
Satisfied Demand (Members - actuals and benchmarked estimates)	10,670	
Unsatisfied Demand (Members)	-157	395
Unsatisfied Demand (Stations)	-7	18
* Negative is oversupply / Positive is undersupply		

General Swimming

- 3.4 Four indoor swimming facilities which provide some form of community access (pay and play, sports club or membership access) have been identified within the district with a total water space of c.1054 sqm between them, although access to the MOD Wattisham pool is restricted to clubs / community groups outside of Army use hours. A further three private facilities – Wortham Pool, Poplar Farm Pool and Wash Farm Barn – only provides swimming lesson and / or private hire provision.

- 3.5 The location of the facilities relative to population density across the district currently is shown in Figure 5. The most significant facility, Mid Suffolk Leisure Centre is located in the area of greatest population density, but there is some more limited provision distributed across other areas of the district to the south east and north.

Figure 5: Indoor Swimming Provision in Mid Suffolk



	Site Name	Area	Access Type
1	MID SUFFOLK LEISURE CENTRE	457	Pay and Play
2	RIVERHILLS HEALTH CLUB AND BOUTIQUE SPA	112	Registered Membership use
3	STRADBROKE SWIM AND FITNESS CENTRE	160	Pay and Play
4	MOD WATTISHAM	325	Sports Club / Community Association
5	WORTHAM POOL - IVY HOUSE FARM	54	Lessons only
6	POPLAR FARM POOL (GOSBECK)	50	Lessons only
7	WASH FARM BARN POOL	57	Lessons only

- 3.6 The findings of the general swimming supply and demand assessment for Mid Suffolk are shown in Table 5. This shows an oversupply currently of c. 350 SQM of water space and increasing to 356 SQM in 2036. This is based on the estimated capacity during peak times across all of the facilities against estimated peak time demand.
- 3.7 It should be noted, this calculation includes the MOD Wattisham pool, although access to this facility is more restricted (i.e. to approved groups only) which will, in reality, significantly reduce its impact on demand.
- 3.8 Excluding the MOD pool, the oversupply is reduced to 25 SQM currently and 31 SQM in 2036.

Table 5: General Swimming Supply and Demand Assessment – Mid Suffolk

Latent Demand General Swimming	2019	2036
Total Population	103,895	112,973
Demand (weekly swimming participants)	6,098	6,046
Total Supply (SQM)	1,053	
Satisfied Demand (weekly swimming participants - actuals and benchmarked estimates)	9,135	
Unsatisfied Demand (weekly swimming participants)	-3,037	-3,088
Unsatisfied Demand (SQM)	-350	-356
* Negative is oversupply / Positive is undersupply		

Swimming Lessons

- 3.9 Based on desktop research, 5 of the facilities shown in Figure 5 have swimming lesson sessions as part of their programming. The capacity of current swimming lesson programmes at each facility have been estimated based on available information and desktop research.
- 3.10 The findings of the supply and demand assessment for swimming lesson provision in Mid Suffolk are summarised in Table 6. This shows an undersupply of provision across the district equivalent to 429 pupils currently and 91 pupils in 2036.

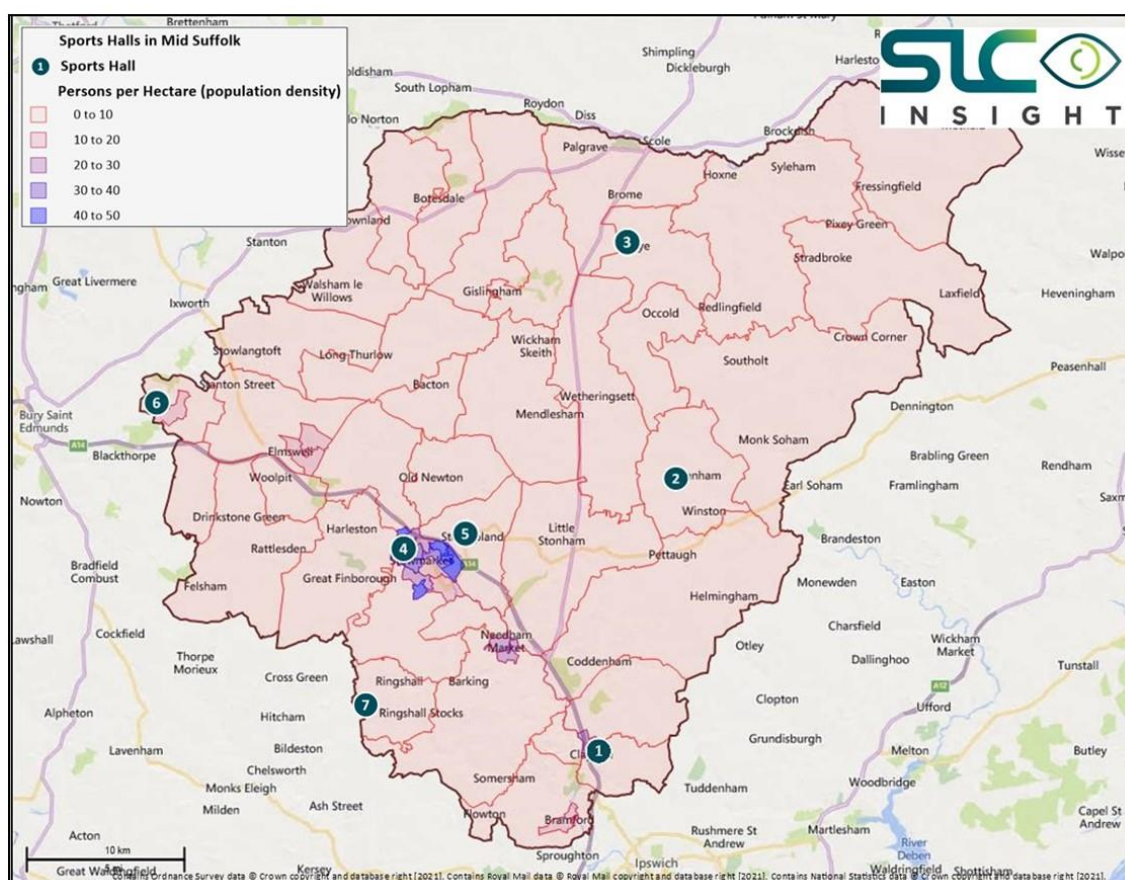
Table 6: Swimming Lessons Supply and Demand Assessment – Mid Suffolk

Latent demand Swimming Lessons	2019	2036
Total Population	103,895	112,973
Demand (pupils)	2,918	2,570
Satisfied Demand (pupils - actuals and benchmarked estimates)	2,489	
Unsatisfied Demand (pupils)	429	81
* Negative is oversupply / Positive is undersupply		

Sports Halls

- 3.11 Nine sports halls with some form of public access across seven sites have been identified in Mid Suffolk. Of these, 7 halls are of 3 badminton court size or greater. There are a total of 28 courts across the eight halls, 25 courts if only the 3+ badminton court halls are included. The distribution of these facilities relative to population density is shown in Figure 6.

Figure 6: Sports Hall Provision in Mid Suffolk



	Site Name	Courts	Access Type
1	CLAYDON HIGH SCHOOL	4	Sports Club / Community Association
2	DEBENHAM SPORTS AND LEISURE	4	Pay and Play
3	HARTISMERE SPORTS CENTRE	3	Sports Club / Community Association
		2	Sports Club / Community Association
4	MID SUFFOLK LEISURE CENTRE	4	Pay and Play
5	STOWUPLAND SPORTS CENTRE	3	Sports Club / Community Association
		1	Sports Club / Community Association
6	THURSTON SPORTS EDUCATION CENTRE	4	Pay and Play
7	MOD WATTISHAM	4	Sports Club / Community Association

- 3.12 An assessment of supply and demand for sports hall provision based on the 2019 and 2036 population of Mid Suffolk has been undertaken using Sport England's Sports Facility Calculator. The Sports Facility Calculator can help to quantify the demand generated by a population for key community sports facilities.
- 3.13 Based on the 2019 population and demographics, the population of Mid Suffolk generates demand for 27.60 badminton courts. – equivalent to 6.9 4-court halls. In 2036, this increases to 28.59 badminton courts or 7.15 4-court halls. This suggests there is a current and future undersupply of sports hall provision in the district, albeit a small one of c. 1.6 – 2.6 courts.
- 3.14 This undersupply is based on the inclusion of a 4-court hall at MOD Wattisham which has some sports club and community association access. However, as with general swimming provision, the more limited accessibility of this facility should be taken into account when considering the balance of provision. Excluding this facility, the shortfall is slightly increased to c. 5.6 – 7.6 badminton courts.

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