

Section 1 Introduction

Commission

- 1.1 In July 2005, Plymouth City Council (PCC), in partnership with the University of Plymouth (UofP), College of St Mark and St John (Marjon), Plymouth Argyle Football Club (PAFC), Plymouth Sports Forum (PSF) and the Primary Care Trust (PCT) appointed Capita Symonds Sport and Leisure Consulting to develop an 'Outline Business Case' for the Central Park Life Centre.

Vision

- 1.2 The vision for the Central Park Life Centre (CPLC) is 'to create an outstanding venue of regional significance for sport, recreation and leisure, and to strengthen Central Park's position as the city's premier park for all residents and visitors to enjoy.' This vision for the Life Centre is embraced and fully supported by all the partners.
- 1.3 This commission forms an integral part of PCC's formal 'Programme Management Framework' that is governed by the Office of Government Commerce Guidelines, and is regarded as being in the pre-feasibility stage. Having established the future Vision for Central Park the 'outline business case' will provide the next stage in the project framework prior to gaining approval to develop a 'detailed business case' and planning to deliver and design the final product.

Key Project Aims

- 1.4 The project itself has a number of key aims, including:
- To educate and improve the health and well being of the people of Plymouth through the medium of sport and recreation
 - To provide sporting facilities and venues to put Plymouth on the world sports map
 - To ensure the sustainability of the development to enable it to continue to deliver its aims

Corporate Fit

- 1.5 On a wider corporate basis The City Strategy, sets out the vision and long-term challenges for Plymouth to ensure by 2020, Plymouth will be 'one of Europe's most vibrant waterfront cities, where an outstanding quality of life is enjoyed by everyone'. To help identify the city's priorities in achieving this vision, eight goals have been identified including 'A celebration of Plymouth's character, culture and diversity', which includes sport and leisure as a key element. This strategy is supported in delivery through the Authorities Corporate Plan 2004-2007, which is comprised of a number of key objectives. The development of the CPLC can make a significant contribution to support the delivery of these objectives in particular:

Corporate Objective 1a of Vision 1

Provide a strong strategic framework to promote investment, guide development and safeguard our built and natural environment

Corporate Objective 3b of Vision 3

Stimulate enterprise and business growth

Corporate Objective 4a of Vision 4

Section 1 Introduction

Improve the quality of sports and leisure provision at Central Park and other locations across the City

Corporate Objective 5j of Vision 5

Work with our partners to reduce health inequalities

Corporate Objective 6d of Vision 6

Make the best use of land and buildings to improve service delivery

- 1.6 The consultant team have recognised this vision and have been cognisant of the need to align the Authorities corporate objectives with those of its partners throughout our study, and ultimately in the delivery of the project outcomes.

Central Park, Plymouth

- 1.7 Central Park is a remarkable opportunity for the development of a regional centre of sporting and leisure excellence. It is an opportunity that could enhance the environment of the park for the benefit of all Plymothians and visitors alike. The landscapes in the park range from formal historic gardens and parklands to informal spaces, and even remnants of the Devon countryside, and it is important to recognise the landmark significance, not only as a reference point for the surrounding residential neighbourhoods, but also in the role that it can play in the city as a destination and arrival point.

History

- 1.8 Created in the 1920's by the Council, Central Park was designed by Thomas Mawson, an eminent architect of his time, to be free to the public and to combine a number of active and passive zones with a hierarchy of paths and routes linking the access points around the perimeter of the Park. The original design combined informal recreation and play, with features such as tennis courts, bowling greens, running track, playing pitches and swimming pool. In the 1920's it was the most ambitious and largest of park to be created in Plymouth and was a response to increasing awareness of the importance of open space and recreation for public health. An exact comparable position to 2005 in relation to PCC and PCT objectives and Central Government targets.
- 1.9 Many features have been added to the park over the years including a cricket club pavilion in 1935, the opening of Central Park Zoo 1962, Central Park Pools in 1965, the Mayflower Centre in 1970, improved grandstands and extension at Home Park in 1986, children's playground in 2003 and youth facility and skatepark in 2004. Whilst new features have been added there has not been any significant investment or redevelopment in overall park layout or structure.
- 1.10 As a result it is now perceived as having a number of significant weaknesses that without development will undermine its position and its potential role in contributing to regeneration in the city. One such weakness is the perception of being run down, which is exemplified by the condition of many of its buildings and features, particularly the Mayflower Centre and Central Park Pools. In addition many of the spaces are sub-divided in such a way as to limit the potential of meaningful activity, reduce the impact of vistas into and out of the park and so creating community safety fears.

Section 1 Introduction

- 1.11 It is recognised however by key stakeholders and the Authorities partners, the opportunity the park can bring for formal and informal leisure and recreation activities. This opportunity derives from its size, location, accessibility, and prominence as a venue. The need to deliver this improved opportunity and develop this 'vision' of Central Park as a destination is a key objective of the Authority. A fundamental part of this is the enhancement and additional development of leisure facilities or 'built activity areas', to create a 'Life Centre' which could comprise sport and leisure facilities of a regional significance. The key requirements is an innovative and sustainable development that will relate to the whole of the Park.

The Project

- 1.12 New leisure facilities in Central Park have been a strategic and political ambition of the authority for some time. In fact over the past 5 years a number of schemes and opportunities for development have been pursued, to date without success.
- 1.13 The requirement to enhance these facilities is a strategic need and operational necessity if the authority wishes to continue to deliver leisure and recreation services from both Central Park Pools and the Mayflower Centre. Both facilities are now 40 and 35 years old respectively. Neither have experienced any significant investment in recent years and are showing considerable signs of physical deterioration. The estimated costs of general refurbishment for both facilities is in the region of £5m-£7m. This would be pre-dominantly to provide services and structure with little customer enhancement. A condition survey on the Mayflower Centre in 2001 estimated the cost to bring the whole facility up to modern day standards was c£7.3m. The likely cost for Central Park Pools could be even greater.
- 1.14 Whilst the condition survey did not provide the detail in relation to the balance between essential and desirable works it is likely that a significant investment will be required within the next 5 years to maintain services at the Mayflower Centre and at Central Park Pools.
- 1.15 In addition to the need for urgent investment the Audit Commission's Best Value inspectors report on the City Council's sport and recreation facilities in 2002 is an important confirming factor in the context of the City's drive to improve the range and quality of sport and leisure provision at Central Park. The report concluded that the City's facilities were 'poor' with 'uncertain prospects for improvement'. BV specific comments made by The BV inspectors made the following comments about the City's current facilities:
- Customers regard the quality of facilities as poor.
 - Recorded satisfaction levels are below the national average.
 - The range of facilities provided by the City Council is limited. It has only one major indoor facility.
 - The interior and exterior fabric of facilities is below the quality of modern leisure facilities and the expectations of users.
 - Reception facilities are generally poor, with limited face-to-face contact with staff. They are not designed for disabled users and not in line with modern reception design.
 - In some facilities access for people with disabilities is poor and this limits participation in some activities.
 - Signs to some facilities are poor making it difficult for users and particularly visitors to the area to find them.

Section 1 Introduction

- Marketing of the service is poor, information to customers on all the sports and leisure services is not well co-ordinated and there is no detailed information on the Council's website.
- There has been a decline in the number of visits from key target groups using the Plymcard scheme.
- The number of customers using sports and recreational facilities has declined and the Council is in the bottom 25% of councils nationally for attendance numbers.

1.16 It is recognised that whilst there may have been some change to these points of view, in general they are still relevant today. Both these facilities whilst in close proximity are managed by two differing management teams, Mayflower through the 'Mayflower Trust' and its Board structure and Central Park Pools directly by the local authority. This creates duplication in operation and there is little synergy or linked strategic direction with regard to service delivery and achieving the wider sporting and corporate objectives of PCC. Potentially this needs to change.

1.17 A number of reports and research projects have substantiated the opportunity for a major/regional development at Central Park including the detailed aborted lottery bid produced by Knight Kavangh Page (KKP) in 2002. Additional reports, such as that by AGL have also supported the opportunity of enabling development, particularly commercial leisure/retail, which would provide complimentary provision to further enhance the Park as a leisure destination.

1.18 Central Park as a leisure destination has the support directly and indirectly of a number of organisations and agencies, particularly Plymouth Argyle FC, University of Plymouth, Marjon College, Primary Care Trust and Plymouth Sports Forum. These partners are directly engaged in the development of 'Central Park', primarily through their representation on the Project Steering Group. Due to the importance and commitment to deliver this project, this group is comprised of very senior and influential representatives from the various partners, and is chaired by Cllr Tudor Evans, Leader of PCC. It is this group that will evaluate this project - the 'outline business case for Central Park', and make the recommendation to PCC to take the project forward to the next stage.

Scope of the Work

1.19 This project, which began in July 2005, was initiated to deliver an 'outline business case' for the Central Park, which would advise on the viability and sustainability of a significant leisure development.

1.20 Capita Symonds were invited to:

- Develop the business plan
- Undertake necessary market research
- Investigate delivery vehicle options
- Prepare capital costs and
- Identify funding opportunities including reviewing the options for an associated hotel development

1.21 The project as highlighted earlier is a key element of PCC's project management framework. A positive outcome will enable the authority to move to the next stage of detailed design and business case.

Section 1 Introduction

Our Approach

- 1.22 Our approach to deliver this brief was included in our original submission and agreed at the initial project set-up meeting. The 6 stages of our approach are highlighted below:

Stage 1 Project Set-up

Stage 2 Facility Mix, Options and Service/ Market Review

Stage 3 Development Options

Stage 4 Funding and Procurement Options

Stage 5 Business Case Development

Stage 6 Reporting

- 1.23 The key elements above are inter-related and the key outcomes derived from the project stages are highlighted in the report.
- 1.24 The nature of the project delivery required regular consultation and reporting to the PCC Project Manager, Chris Robson and we are very grateful for the support and help Chris, and his colleagues, have given in delivering this assignment.

Project Team

- 1.25 In response to the requirements of the authorities brief and the requirements of the project we put together a skilled and experienced team. The Capita Symonds project team comprised:

Chris Spargo	Project Manager
Grant Aitken	Senior Consultant
Renata Drinkwater	Consultant (Hotel and Tourism)
Graham Marchant	Researcher
Ian Dacre	Cost Manager
Sharon Bayton	Project Mentor (Quality Assurance)
Iain Martin	Architectural Advisor (Capita Percy Thomas)
Anthony Williams	Cinema/ Commercial Consultant

- 1.26 The consultant team worked very closely with the Authorities nominated project manager, Chris Robson and reported to the Project Steering Group. This Steering Group was comprised of the following main members although attendances at some of the meetings were made by other officers and partner representatives.

Councillor Tudor Evans	Leader of Plymouth City Council (PCC) - Chair
Councillor Peter Smith	Member & Portfolio Holder (PCC)
Bronwen Lacey	Director for Lifelong Learning (PCC)
Nalin Seneviratne	Head of Asset Management (PCC)
Paul Stapleton	Chairman of Plymouth Argyle Football Club
David Baker	Principal of College of St Mark & St John
Nigel Rowe	Chair of Plymouth Sports Forum
Robert Stannage	University of Plymouth
Roddy McKenzie	Team Manager, Architects (PCC)
Chris Robson	Senior Project Manager (PCC)
Jim Clark	Regional Director Sport England
Trevor Watkins	Solicitor - Clarke Willmott
Martin Berkein	University of Plymouth

Section 1 Introduction

Report Format

1.27 The report has been structured to include detail on all elements of the work undertaken in completing the 'outline business case for the Central Park Life Centre.' The report format reflects the staged approach adopted to complete the project. The sections of the report are listed below:

- Policy Context – Strategic Review and Positioning
- Consultation
- Study Area Demographics
- Market Review
- Development Options and Business Planning
- Funding, Procurement and Management Options
- Hotel and Tourism Market and Impact on Central park
- Conclusions and Recommendations
- Appendices

Section 2 Policy Context – Strategic Review and Positioning

Time for Change

- 2.1 Plymouth is undergoing a renaissance in terms of urban development and overall performance of the authority. Plymouth is one of the largest cities on the south coast of England with a population of 241,5000 (2003 estimates). The average age of residents is 38.5 years. It is a vibrant and cosmopolitan city with abundant natural resources and a heritage of discovery, endeavour and enterprise. However, there are high levels of deprivation with 27% of the population living in the South West's most deprived 'super output areas'. The Devon Structure Plan requires Plymouth to provide an additional 10,000 dwellings, therefore increasing the future population to approximately 250,000 – evidently a time of change for the city.
- 2.2 This section of the report looks at the national, regional and local strategic policy context to identify the key drivers of the report and strategic contribution that the development of Central Park can make to meeting sport and other policy objectives. This section will help align the development of the project with the strategic objectives required to meet project partner's needs and pursue external funding opportunities.
- 2.3 The policy documents following are examined under national, regional and local headings.

National Context

Game Plan

- 2.4 The most recent significant change in Government policy relating to sport and leisure has been 'Game Plan: a strategy for delivering the Government's sport and physical activity objectives'. Published in 2002 by The Strategy Unit the document recognises the value and role of sport and physical activity in tackling a range of issues. Game Plan recognises that the quality and quantity of participation is lower than it could be, and that levels of participation have not changed significantly over recent years.

Framework for Sport

- 2.5 In response to Game Plan, Sport England published a 'Framework for Sport' as a document to provide a clear vision of sport in England and Wales with defined objectives. The vision is supported by seven policy areas that reinforce the role of sport in contributing to wider social objectives and include:
- Increase participation
 - Improve performance
 - Widen access
 - Improve health and well-being
 - Create stronger and safer communities
 - Improve education
 - Benefit the economy

Department of Culture, Media and Sport (DCMS) – 5 Year Plan

- 2.6 The Department of Culture Media and Sport (DCMS) in its recent 5-year vision, 'Living Life to the Full', also identifies the role of sport and leisure. The vision acknowledges the changes in people's leisure patterns and the resulting increased pressure on providers to meet these changing needs. These pressures on facility

Section 2 Policy Context – Strategic Review and Positioning

providers is also considered in the Sport England Framework which identifies the 'expressed' demand for the creation of modern family friendly multi-sport hubs.

2.7 As part of the changes facing the sport and recreation sector DCMS has set a number of targets to support and increase participation including:

- All children to have two hours of PE and sport per week by 2010, plus a further two to three hours per week outside school; and
- To get more people playing sport and physical activity by making it easier to start and keep exercising through building more facilities and drawing-in private sector investment to provide the facilities each community needs with the services that are convenient to them.

The Carter Review

2.8 In March 2005 Lord Patrick Carter undertook a review of sport co-ordination of effort and resources and identified five areas for consideration over the next three years, to 2008, including:

1. Introduce robust measurement and monitoring systems to inform Government investment at local level
2. Promotion of benefits of sport and physical activity
3. To improve local delivery through supporting co-ordination of public, private and voluntary sector investment to improve local sporting facilities
4. To create single access point and brand for sport in England
5. To provide targeted incentives and commercial assistance

Planning – National

2.9 There are three key national Planning Policy Guidance (PPGs) notes which relate to the proposed leisure development at Central Park. These are:

2.10 PPG6 – Town Centre and Retail Developments. The document includes specific advice relating to leisure proposals. The aim is to sustain the vitality of town centres in the wake of pressure to develop out of town. It is suggested that a 'sequential approach' is adopted, which means that the first preference for developments of this type should be for town centre sites, followed by edge of centre sites, district and local centres and only then out of centre sites in locations that are accessible by a variety of means of transport. This guidance states that the approach should apply to all town centre uses that attract large numbers of people, including leisure.

2.11 PPG 17 – Open Space, Sport and Recreation. The document highlights the need for robust assessment of local needs and audits of existing and planned facilities. The presumption is against development that would unnecessarily reduce the supply of open space and towards improvement in the quality of facilities and their management. The importance of accessibility is emphasised. A companion guide to PPG17 sets out in detail the suggested assessment process

2.12 PPG21 – Tourism. It highlights the economic significance of tourism, explains how it should be dealt with in development plans and suggests ways in which it should be regulated and facilitated. The aim is to create a balance between achieving the economic benefit that tourism development can undoubtedly bring while respecting the environment and the characteristics of individual development areas.

Section 2 Policy Context – Strategic Review and Positioning

Realising the Potential of All Our Regions: The Story So Far 2005 – ODPM

- 2.13 There are several key bodies charged with improving the economic performance of the English Regions.
- 2.14 The Regional Development Agencies were created in 1999, SWRDA in the South West, are responsible for regional economic development and working with regional stakeholders. Lead responsibility for the sponsorship of the Regional Development Agencies rests with the Department of Trade and Industry, but the Office of the Deputy Prime Minister has policy responsibility for the regeneration initiatives delivered by the Regional Development Agencies.
- 2.15 The Government Offices for the Regions represent Central Government in each region. They are also responsible for the allocation of European Structural Funds and the coordination of regional housing and planning issues.
- 2.16 Regional Assemblies are comprised of representatives of local authorities, businesses and voluntary groups. They scrutinise the regional economic strategies prepared by the Regional Development Agencies and, since 2003, have been the Regional Planning Bodies with responsibility for overseeing the production of the Regional Spatial Strategies by the Government Offices.
- 2.17 This document, issued by the Office of the Deputy Prime Minister together with the Department of Trade & Industry and the Treasury, sets out the latest thinking on the regions. The stated aim is to:
- ‘Make sustainable improvements in the economic performance of all the English Regions by 2008 and over the long term reduce the persistent gap in growth rates between the regions, demonstrating progress by 2006’.
- 2.18 The document sets out:
- How the regions are empowered to operate
 - Regional and local leadership strategies for growth
 - How employment can be increased
 - Skills and education issues
 - How enterprise will be encouraged
 - How innovation will be encouraged.
- 2.19 The Regional Development Agencies invest nearly £2bn annually. Funds are allocated in a Single Pot to each Regional Development Agency so that they can use them as they see fit to achieve their individual targets.
- 2.20 The focus is on economic development, but there is specific mention of the regenerative qualities of sport and recreation development in the document, exemplified by the Lower Lee Valley opportunities presented by the 2012 Olympic Bid. There is also reference to tourism and the fact that the Regional Development Agencies are now responsible for the strategic leadership of this important industry sector, delivering to the Tomorrow’s Tourism Today 2004 agenda

Tomorrows Tourism Today – DCMS – 2004

- 2.21 In 1999, Tomorrow’s Tourism set out the Government's strategic approach to meeting the needs of the tourism sector, and its aims for encouraging a growing and

Section 2 Policy Context – Strategic Review and Positioning

prosperous industry. Building on this, the Government published Tomorrow's Tourism Today in 2004 - a prospectus for tourism development.

- 2.22 Tomorrow's Tourism Today outlines plans for action and responsibilities for delivery for the Department of Culture, Media and Sport and its key partners in five areas. These are the four joint priorities agreed by the Department of Culture, Media and Sport and the tourism industry:
- Marketing and e-tourism
 - Quality
 - Skills
 - Data, plus
 - A fifth priority for the Department of Culture, Media and Sport – advocacy for tourism across Whitehall and the European Union.
- 2.23 The tourism reform agenda has led to significant changes in the structures that help support the tourism industry. Most notable are the creation of 'Visit Britain' as a marketing organisation promoting Britain abroad and England domestically, and the passing of regional tourism strategy in England to the Regional Development Agencies as mentioned earlier.

Youth Matters – DFES – July 2005

- 2.24 On 18 July 2005 the Government published the Youth Green Paper, Youth Matters. It addresses key issues relating to support and challenges for teenagers.
- 2.25 The Government is seeking to consult young people, parents and professionals on the proposals. Building on the ambition of Every Child Matters, which promotes the idea that all young people should achieve five key outcomes (being healthy, staying safe, enjoying and achieving, making a positive contribution and achieving economic well-being), Youth Matters aims to radically re-shape services for young people.
- 2.26 The consultation document sets out a comprehensive package aimed at improving outcomes for all young people, with a particular emphasis on those who are disadvantaged. The key themes are listed below:

The Government want young people to have more things to do and places to go in their local area:

- 2.27 Young people will have more choice and influence over services and facilities that are available to them. They also want to encourage young people to volunteer and contribute to their local community.
- 2.28 The Government will set national standards for the activities available to young people and give local authorities £40m over two years to develop innovative approaches to facilities for young people. They will support local authorities to pilot "opportunity cards" which will offer discounts and top-ups to help more young people get involved in these activities.
- 2.29 The government want to put the power into the hands of young people by giving them and their parents a say about what services are available. They will create "opportunity funds" to spend on local projects young people want.

Section 2 Policy Context – Strategic Review and Positioning

Better information, advice and guidance about issues that matter to them, delivered in the way they want to receive it.

- 2.30 Local authorities will work in partnership with children's trusts, schools and colleges to deliver this and will encourage them to preserve high-performing Connexions Services.

Better support for those who have more serious problems.

- 2.31 The Government will ensure that young people with more serious problems receive an integrated package of support from someone they know and trust. A designated lead professional will be their single point of contact to make sure that support is provided in a coordinated, convenient and integrated way. Youth Matters will give new opportunities to all young people, except where they become involved in unacceptable or anti-social behaviour. In this case opportunity cards would be suspended or withdrawn.
- 2.32 In summary, the proposals outlined in Youth Matters will support the development at Central Park in that it can make a significant contribution to the stated objectives.

Delivering Choosing Health 2005

- 2.33 This delivery plan follows on from the Wanless Report: Securing Good Health for the Whole Population 2004 and the Choosing Health: Making Healthier Choices Easier 2004 White Paper. It outlines how the Department of Health and the National Health Service will work with partners at national, regional and local levels to improve health outcomes, and is supported by two other new Action Plans:
- Choosing a Better Diet
 - Choosing Activity.
- 2.34 The key priorities for delivery are based on:
- Tackling health inequalities
 - Reducing the number of people who smoke
 - Tackling obesity
 - Improving sexual health
 - Improving mental health and well being,
 - Reducing harm and encouraging sensible drinking
 - Helping children and young people lead healthy lives, and
 - Promoting healthy and active life amongst older people
- 2.35 The document recognises that local needs will vary and that therefore local government, the Primary Care Trusts and Local Strategic Partnerships will have leading roles to play. In addition Government Offices in the Regions, Regional Assemblies and Regional Development Agencies will be involved.
- 2.36 Detailed targets for improvement have been set. In the case of tackling obesity these cross refer to Game Plan and Sport England's Delivery Plan 2005 amongst others, and in the case of helping children to lead healthy lives to Learning through PE and School Sport 2003. Some of the initiatives proposed include a national obesity awareness campaign, lifestyle guidance for those wanting to lose weight, and promoting increased physical activity through PE, sport and play. Over three years an additional £1bn will be spent on action in support of the plan.

Section 2 Policy Context – Strategic Review and Positioning

- 2.37 In the light of this and the supporting documents, it is clear that the government is keen to involve sport and leisure providers in initiatives designed to contribute to the achievement of the health improvement targets.

Building Schools for the Future Initiative

- 2.38 This government initiative will fund £2.2bn of investment in a secondary school building in 2005-06. There is a further commitment to a 15-year programme of secondary school renovation. This represents an opportunity to reconsider what modern schools should contain, and offers opportunities to add additional facilities such as health care, social care and leisure provision.
- 2.39 Wave 1 authorities have been developing their funding, educational visions and detailed physical school plans with the Department for Education and Skills, Partnerships for Schools and others. They are now starting the official procurement process.

Gershon: “Releasing Resources for the Frontline: Independent Review of Public Sector Efficiency”. HMSO July 2004.

- 2.40 The Gershon Review sets out the conclusions of Sir Peter Gershon’s review of public sector efficiency. In particular, it sets out the scope for further efficiencies that he has identified within the public sector’s back office, procurement, transaction service and policy-making functions. Gershon also identifies *opportunities for increasing the productive time of professionals working in schools*, hospitals and other frontline public services (including *local government*), and makes a series of cross-cutting recommendations to further embed efficiency across the public sector.
- 2.41 The Review concludes by summarising the specific efficiency proposals that Gershon developed with individual Government departments and other public sector bodies during the concluding phase of his review.
- 2.42 Local authorities are now establishing working groups to identify potential activities where efficiency savings can be achieved. Members of POS are recommended to become party to the activities of such groups.

Extract of Gershon’s Conclusions re Local Government

“Achieving greater efficiency across the whole of the public sector is essential to support the Government’s continuous drive for improved public service delivery. Local government has a key role to play in this ambitious agenda, and many local authorities are already securing efficiencies through investment in technology and rationalisation of back office and procurement functions. The Spending Review builds on existing best practice and proposes efficiency savings in local government of 2.5 per cent per annum to deliver £6.45 billion of efficiencies and productivity improvements by 2007-08, releasing additional resources to front-line services”.

- 2.43 According to DCMS £28m required for 2004/5 has been achieved from Local Authorities Culture and Sport, with a target of £49m now required for 2005/6.

London 2012

- 2.44 The announcement on July 6th 2005, that London will host the 2012 Olympic and Paralympic Games will have a significant impact on the profile of sport in the years leading up to the games. During the bidding process sport has risen significantly up the national political agenda and this will increase over the coming years. The bid placed a great emphasis on the benefits for young people and the legacy that the games in London will leave for future generations.
- 2.45 The benefits of the games will not be limited to London alone, with a number of events taking place at locations outside London and the southeast. There will also be opportunities for the regions to host training and acclimatisation camps for participating countries in the years and months prior to the games. Many regions and local authorities are already developing plans to welcome and host competing teams in many case this will involve careful investment in new facilities that will be able to accommodate visiting teams and also provide a legacy for the local community.
- 2.46 There will be significant economic benefits for the country, as many visitors to the games will attend only one or two events before then visiting other areas of the country. This provides further opportunities for local authorities to attract visitors to boost their local economies.

Regional

South West Regional Sports Plan

- 2.47 Produced in 2004 by the Regional Sports Board, the Regional Sports Plan identifies a number of priorities to deliver its vision through four themed areas, including:
- Delivering community sport
 - Encouraging active living
 - Influencing strategic planning
 - Raising the profile of sport
- 2.48 The Life Centre development has the ability to deliver across all four themed areas and contribute directly to a number of the stated policy areas of the South West Regional Sport Plan, including
- Developing a new approach to providing facilities so they can be used for number of purposes
 - Establishing multi-club and multi- hub sites

Regional Economic Strategy The South West of England 2003 –2012.

- 2.49 This is the second Regional Economic Strategy to build the long-term vision of the region in which economic prosperity and quality of life go together. As a regional strategy it does not define in detail what could happen, but rather leaves it up to the sub-regional partnerships and Local Strategic Partnerships to produce strategies showing how they will deal with the most important issues in the area.
- 2.50 There are specific references to the regions cultural assets as well as the potential opportunities to gain economic benefits, for example, ‘ the quality of life (often associated with environmental quality and cultural opportunities) in the region is a

Section 2 Policy Context – Strategic Review and Positioning

major attractor of investment, business, workers and tourists.’ As a result, Strategic Objective 3, to *Improve regional communications and partnerships*, has identified a number of strategic actions including:

- the need to conserve and enhance the regions physical and cultural capital to provide major benefits to tourism and the wider economics
- the development of high quality cultural projects that enhance the region’s cultural and environmental heritage
- Identify and bid for cultural and supporting events of national significance.

2.51 Furthermore Plymouth is identified as a priority area to promote the renaissance of the regions largest urban areas by concentrating major developments in and around Plymouth.

Local

City Strategy

2.52 There are a hierarchy of strategies and plans that provide the performance management framework of the authority and to an extent it partners. The *City Strategy*, sets out the vision and long term challenges for the city to ensure by 2020, Plymouth will be ‘one of Europe, most vibrant waterfront cities, where an outstanding quality of life is enjoyed by everyone’.

2.53 The strategy builds on the past and aims to bring together organisations and services that contribute to daily life. To help identify the city’s priorities, eight goals have been identified including ‘A celebration of Plymouth’s character, culture and diversity’, which includes sports and leisure.

Corporate Plan

2.54 To support the City Strategy, the Council has produced its *Corporate Plan* to ensure its policies, priorities and actions align to the wider goals and priorities of the City Strategy. In terms of sport and leisure, the Corporate Plan recognises the significant improvements in the service over the last 2 years and its ambitions to develop leisure facilities by working in partnership with major sport and leisure partners in the city. One specific objective is to ‘improve the quality of sports and leisure provision at Central Park and other locations across the city’.

Best Value Performance Plan

2.55 The *Best Value Performance Plan*, produced annually reflects the work carried out in the past 12 months while also identifying future priorities. Under improving sport and leisure the plan identifies its commitment to develop a plan to deliver high quality sport and leisure facilities at Central Park.

The City of Plymouth Local Plan (1995 – 2011)

2.56 The plan is divided into 4 key sections relating to the future direction of the City. These are as follows:

- Purpose and context of the plan
- Strategy
- Proposals

Section 2 Policy Context – Strategic Review and Positioning

- Policies

- 2.57 The Local Plan is essential to this project as it has significant weight in decision making and future planning applications. The plan stipulates that planning applications must be determined in accordance with the development plan unless material considerations indicate otherwise. Any plans which conflict with its content must give convincing reasons to demonstrate why the plan should not prevail.
- 2.58 The first section looks at the purpose and context of the Local Plan. The strategic context is reviewed International, National, Regional and Locally. On a regional basis, the Devon County Structure Plan identifies Plymouth as a regional centre to act as a focal point for new development. In relation to neighbouring authorities, they view Plymouth as a regional centre for jobs, shopping and other facilities, two of which will be heavily provided for by the Central Park Life Centre.
- 2.59 In order to achieve the City's vision for 2020, one of the key objectives is to be an attractive international and sub-regional centre for which leisure can play a significant part.
- 2.60 Of the 124 proposals that are identified, only a small number could have a direct impact on this project. These are the sport and leisure specific related proposals. These are at the following sites:
- Tinside Pool and Foreshore
 - Ministry of Defence Mount Wise
 - Brickfields
 - Land at Manadon
 - Woodford

Local Development Framework

- 2.61 The current local plan was adopted in 1996. As part of the process of producing Plymouth's *Local Development Framework*, a policy document was prepared to shape the content of Central Park through an Area Action Plan. The document outlines the options available to realise a vision of Central Park as an 'outstanding venue of regional significance for sport, recreation and leisure, and to strengthen Central Parks' position as the city's premier park for all residents and visitor to enjoy'. The options include:
- creation of a Life Centre through the redevelopment of existing sport and leisure facilities
 - create a new transport interchange
 - enabling development such as:
 - commercial leisure development,
 - residential,
 - relocation of bus depot.
- 2.62 The consultation from these proposals has been received and from the preliminary appraisal a number of issues have been raised, including:
- there is support for integrated design but acknowledges there could be tensions between the concept of regional centre of sporting and leisure excellence and the Park's role as a much needed local resource

Section 2 Policy Context – Strategic Review and Positioning

- potential for substantial growth in traffic movements and the uncertainty over support for public transport links raises concerns about the sustainability of the project
- issues of public safety due to increased movement and grouping of people
- prospects for securing the required level of investment in basic infrastructure improvement to the park

2.63 From a total of 472 responses, 425 expressed concern relating to the Central Park Area Action Plan. It must be noted that the vast majority of these were part of a general petition. 34 of the responses were in full support of the 50m pool and the completion of Home Park Stadium developments to benefit sport, while also recognising that commercial elements such as hotel, conference and exhibition facilities would be seen as complementary to the existing uses within the park.

Sports Plan 2020

2.64 *Sports Plan 2020* and subsequently reviewed in 2005, was produced in August 2001 to provide a policy framework for the provision of sport in Plymouth. The plan fits into the City's main strategic vision as outlined above and has a vision to 'support involvement in sport and recreational activity for all members of the community; within this, to specifically target resources at work with young people for whom direct support will be made available. The principle being to promote personal choice and sustained involvement from introductory activity through to higher levels of performance'

Plymouth Sports Facility Strategy

2.65 *Plymouth Sports Facility Strategy* reviews the range of facilities in Plymouth and presents a strategic document considering the wider requirements of the city. Plymouth has a wide range of facilities that vary on standard, ownership and management, with much of the stock ageing. Within the strategy the development of a Central Park Leisure Centre is identified as a major proposal for capital development. However the report also notes five other major development projects. The report also identifies a range of sports and their key facility requirements. The following sports are identified within the proposed Central Park Leisure Centre

- Basketball – performance centre
- Badminton – performance centre
- Diving – training and competition
- Gymnastics – foundation and competition
- Health and fitness – general
- Netball – club and league
- Swimming – competition, training and coaching
- Volleyball

2.66 The following is an extract from the draft Sports Facility Strategy on justification for the development of a Central Park Leisure Centre

'The proposal will help to:

- *Meet a need for a high quality, centrally located, publicly accessible sports venue in the city*
- *Ensure that subsidy is applied to meet social objectives*
- *Emphasises developmental, multi-sport objectives becoming a hub site*

Section 2 Policy Context – Strategic Review and Positioning

- *Service health needs of key communities in the city's most deprived wards*
- *Provide an accessible county and /or regionally significant venue for specific sports*
- *Raise visibility – Central Park being at the heart of the city*
- *Deliver a partnership-based facility serving the whole community*
- *Help to meet the need for quality sports facilities in Plymouth – to compensate for years of under investment.*

2.67 The report also summaries the range of facilities available in Plymouth and concludes that, based on the Sport England Facility Planning Model (1999) there is an unmet demand for a sports hall and there is an unmet demand for swimming provision.

University of Plymouth Learning Facilities, Sport and Recreation Service Strategy (Draft)

2.68 The strategic intention of the University of Plymouth in relation to sport and recreation is to improve the quality of life for staff, students and the community in order to make the University a more attractive place to study and work. The Recreation Services department aims to provide the physical resources and expertise to make this happen. The implementation of this strategy will provide a number of benefits which could all be achieved through the Central Park Life Centre Project.

2.69 There are a number of objectives and actions covering areas such as participation, facility development (through increased partnership working), world class water sports development, development of regional strategic planning for sport, coach development, promote student / staff volunteering opportunities in the community, development of grass roots participation development (in partnership with the Students Union) and working in partnership with the Health Studies department to develop programmes. The Central Park development can contribute to a number of these areas.

2.70 Focusing on the future, Recreation will continue to work in partnership with other providers in the region to provide facilities and services which will increase overall active participation. This is emphasised by the partnership working on the Life Centre project where the University see the potential benefits the development could bring to the University.

2.71 A recommendation is made within the strategy that the University continue to working in partnership with Plymouth City on the development of a new multi purpose sports complex to open in 2007. As part of the action planning the performance indicators in relation to this recommendation are to be involved in the planning of the new facilities and services within the new complex.

Marjon Strategic Plan 2010

2.72 As part of the strategic plan, the college identifies 8 values that they are committed to. The Cental Park Life Centre could indirectly support the achievement of some of these values. These are:

- Enabling and supporting students and staff to reach their full personal and professional potential and thereby promoting human advancement and creativity.
- Contributing to the social, cultural and economic development of the region.

Section 2 Policy Context – Strategic Review and Positioning

- Ensuring equality of opportunity.
- Working towards a sustainable future.

2.73 The strategic plan then identifies key aims over the next 3 years. Three of these aims can be related to the project:

- Enhance and sustain recruitment, widening participation and retention of students.
- Form strategic partnerships with a range of education providers, public and private sector organisations.
- Ensure that the college maintains a viable and sustainable financial base that allows for major strategic investment.

2.74 Marjon have been successful from a sporting achievement perspective with individuals and teams, particularly basketball, and wish to continue celebrating student success at regional and national level. The facilities provided by the Life Centre would provide additional opportunities for Marjon College in addition to their current excellent offering.

Key Findings

2.75 The strategic review has identified a general and specific need for the development of new and enhanced facilities at Central Park. Nationally there is a drive for improved access to services to deliver the health and well being agenda, youth provision, wider access and opportunities for increased participation whilst also providing facilities to meet the needs of sport, and sporting organisations.

2.76 The Central Park location for leisure has been established through the Local Plan and the LDF, and offers good opportunities to further enhance provision for Plymouth. It can be seen as a model for achieving the multi-sport hub concept of Sport England, South West, and so strategically has the opportunity to attract grant aid towards the project. The South West Economic Development Strategy also recognised the need to enhance the regions physical and cultural capital to provide major benefits to tourism and the wider economics, while the development of high quality cultural projects will enhance the region's cultural and environmental heritage. It will also support the identification and bidding for cultural and supporting events of national significance.

2.77 Locally a number of the strategies recognise the development as an opportunity to meet regional and local need, especially in terms of the wider sport and recreation offering, in particular with its partners at the University of Plymouth and Marjon. This is supported in the Sports Plan 2020 and the City Facilities Strategy which identifies a unmet demand for sports halls and swimming in Plymouth, and identifies the need for a major leisure development at Central Park, that will contribute significantly to a range of health and sports development outcomes.

2.78 In summary, at a strategic level, the delivery of the Life Centre in Central Park will contribute to a number of agendas at a national, regional and local level. This 'strategic fit' will support the pursuit of additional specific funding opportunities.

Section 3 Consultation

Consultation

- 3.1 The nature of this project and the past history behind trying to develop enhanced leisure facilities at Central Park significantly influenced the consultation process. It must be stated that significant consultation, specifically from a sports perspective was undertaken in 2002 as part of the Sport England Lottery Fund (SELF) bid. This consultation took the form of individual and group interviews, questionnaires, focus groups and public meetings. The existing documented consultation including the following organisations groups and individuals:
- Governing Bodies of Sport:
 - ASA (Amateur Swimming Association)
 - EBBA (English basketball Association)
 - ECB (English Cricket Board)
 - British Judo association
 - British Shokotan Karate Union
 - English Bowls Association
 - Plymouth Swallows Gymnastics Club
 - Plymouth Trampolining Club
 - Tamar Gymnastics Club
 - British Gymnastics –South West
 - Mayflower Badminton, Netball, Rollerhockey, Indoor Bowls and Kickboxing Clubs
 - Shokotan Karate
 - Mayflower Football Coaching Club
 - Devon county Bowls
 - Plymouth Judo
 - Development Officers Basketball, Netball, and Cricket
 - Plymouth Raiders
 - Plymouth Diving Club
- 3.2 This consultation identified considerable support for a new facility. It has helped to establish latent demand and provide support for additional facilities based on proven sporting need.
- 3.3 We have taken this information as generally being still relevant today. This view was supported by Leisure officers and has allowed us to concentrate current resources for consultation on partners and key agencies. In particular we have been keen to focus on the need for funding resources. However, in order to develop an understanding of the wider sporting need and the particular relevance of the previous consultation we delivered a workshop about the Central Park redevelopment with representatives from Plymouth Sports Forum.
- 3.4 The issues arising from the 2002 and current consultation have been integrated the study process. Below, under the following headings is a survey of key findings.
- Political
 - Asset Management
 - Leisure Officers
 - Plymouth Argyle
 - University of Plymouth
 - Marjon
 - PCT (Primary Care Trust)
 - Plymouth Sports Forum
 - Sport England
 - Other Agencies

Section 3 Consultation

3.5 The commercial issues are primarily addressed in Sections 7 and 8, Funding and Development Options.

Political

3.6 There is a real will to deliver this project strategically, politically and operationally. The vision for Central Park as communicated through the Mackay Plan recognised a number of opportunities that could benefit the development of Central Park, including the Mill Bay development. This will create a boulevard to open up the waterfront and provides an opportunity to consider the future of the Pavilions. Other key issues include:

- The current poor state of facilities for the community
- Recent Best Value Inspection Plan sets out the requirements if the council wants to increase its rating over time
- Budgetary Pressures in terms of Leisure means there is a need to consider an entrepreneurial approach, for example having the market challenge the status quo
- Desire with Home Park to complete the stand redevelopment means there are opportunities for synergies between the leisure developments
- Council budgetary pressures has resulted in a refocusing of resources
- Age of current facilities means something has to be done
- University of Plymouth and Marjon offer increased partnerships specifically the capital support from University of Plymouth.
- Recognition need to publicly manage loss of some greenspace
- Politicians need to lobby senior influential MP's including Richard Caborn (Minister of Sport)
- Meets all central government agendas
- Portfolio holder is Chair of Mayflower Trust so aware of issues on facility operations
- Central Park can become a destination
- Bowls should be incorporated into the main facility not separate
- Recognise may need to be a phased approach to delivery

Asset Management

3.7 The Asset Management team provided ongoing consultation, information and direction throughout the study which was very beneficial and supportive. It is the Asset team through the designated project manager that is leading the project for the Authority, and providing ongoing support to the Steering Group.

3.8 A considerable amount of work that already been produced early in the pre-initiation stage of the project such as:

- Establishing a number of working groups
- Developing the requirements of the partners (see Appendix A)
- Developing the basis for the facility mix
- Developing initial design requirements
- Developing the basis for the overall Central Park Master Plan

3.9 Some of the issues that were raised throughout the process include:

- Commitment to deliver project

Section 3 Consultation

- Status quo not an option as significant capital requirement to refurbish existing facilities
- No capital programme allocation to project undermines its importance
- Need to provide viable and sustainable solution
- No real concern of management vehicle to operate could be a DBO (design, build and operate)
- Options available include Pavilions and Seaton Pool linked to regeneration objectives
- Misaligned development of Master Plan in comparison to Plymouth Argyle
- Also project managing Brickfields development. Eventhough is a new leisure facility will not have an impact on the development of Central Park. As a result of the funding requirements a new Trust will need to be established the manage the facility, which means there will then be 4 different leisure services deliverers in Plymouth – Mayflower Trust, PCC, Theatre Royal Trust and the new Brickfields Trust.

Leisure Officers

- 3.10 The Central Park leisure development has been an ongoing priority for the Leisure section over the past 5 years. This has included various costed options and a detailed lottery bid in 2002.
- 3.11 Similarly there is a real commitment to develop the project and address the current shortfall in service quality and facility provision, which is recognised. There is an acceptance there is a need to change the way the facilities are managed due the lack of capital programme and future investment opportunities, year on year revenue cuts, and other constraints of managing in a local government environment.
- 3.12 There is also a recognition of the need to address the varying service delivery vehicles to have greater strategic control in order to contribute more effectively to corporate and sporting objectives – nothing joined up.

A range of other issues raised are highlighted below:

- Sport never been high on the political agenda although Central Park is now
- Lack of any investment in recent years and no sign of change
- Original 3 year capital programme had £6m allocated to Central Park – concerned for future of the project as this is no longer allocated
- Council is property and land rich so there is opportunity of capital receipts
- Great opportunity to contribute to health agenda and raise participation levels with new facility
- Issue of governance issue with elected member involvement on both Trust Boards

Plymouth Argyle (PAFC)

- 3.13 The Authority and PAFC have a very good working relationship and Paul Stapleton (PAFC Chairman) is a member of the CPLC Steering Group. It is evident and recognised that both parties will benefit reciprocally from the development of Home Park and the CPLC. There was a concern from PAFC on the development of the overall Master Plan and that they had moved further and considerably quicker with their Home Park project than the Authority.

Section 3 Consultation

3.14 Other general issues raised included:

- The three sides to Home Park were completed in 2001 but PAFC have always had ambitions to develop the fourth side
- PAFC are very positive about the Life Centre for Argyle and Plymouth in general.
- They see Central Park as being ideal for sporting facilities as a destination
- PAFC are quite happy to use the stand development as part of it, particularly involving the PCT with some sort of facility. Already have Playing for Success scheme
- PAFC need to consider moving on the project quickly although still a number of options being developed
- Parking is a key issue for the stadium and the potential new development.
- The Piazza idea outside the stadium is supported although need to address the loss of car parking
- Currently have planning for 18,000 capacity but want to increase this to 22-25,000
- Transport planners to be used to assess transport implications
- Catering and hospitality provision around 68,000sqft. High quality and general restaurant provision 7 days
- Generally quite flexible on many areas – see both developments being complimentary
- Potential hotel development has been explored at the Derriford end with discussions with the Marriott hotel chain. Other various possibilities discussed and many options still available
- Discussions been held with Fitness First on fitness provision
- Club acquired adjacent Goals astro-turf facility
- No funding is being provided by PAFC to the CPLC project and it is unlikely any future funding could be provided

University of Plymouth

3.15 The University of Plymouth have a definite requirement for an increasing amount of leisure facility space to deliver their academic and sporting requirements. They also have a need for additional and improved grass pitches, and their need is rather imminent. As a result of this, and their commitment to delivering the wider sports and health agenda they have committed £3m to support this project.

3.16 It is evident that as this project has been slow in generating firm proposals for development, the University will soon require a clear commitment to proceed otherwise it is likely to withdraw its offer of funding and look for alternatives.

3.17 The University has an excellent reputation and student numbers have rapidly increased year on year with 2005 intake being it's highest ever with 35,000 registered students.

3.18 A summary of other points are listed below:

- The Sports Board have various stakeholders and meet four times a year. Lesley deals with strategic documents and reports to the board.
- The Council and University have started to work better in partnership over the last four years where previously they had often worked in isolation.
- The Sport and Recreation service strategy is delivered every year in line with the University's strategic plan and government agendas.

Section 3 Consultation

- The University does have a new 120 station fitness suite so a fitness suite is not currently a priority for the University
- There are 47 sports clubs run by committees. Students union now do the hiring of the facilities
- Coach development is a growth area with focus on five core clubs. RFU is a good example with professional coaches / students going into schools and students can gain qualifications in coaching from it
- They expect not to have to pay for hiring of facilities with X number of hours for free because of their £3m proposed investment in the facility.
- They worked out that £3m would last 60 years in hiring terms for the University.
- The programming requirements are growing as the University grows and it is recognised additional facility requirements over an above the agreed allocation at start-up
- CPLC would be great organisationally for the University.
- They currently need 3 hours a weekday sports hall time, sole swimming pool space with additional lane swimming time on weeknights and Sundays the ideal University times
- They currently use all wet facilities locally and so the new centre would provide them with one major facility
- Phase 1 – Dry Sports within the next 2 years is their requirement with the University being happy to manage this, with also joint management a possibility
- Facility Mix Issues:
 - Ice can make money if managed very effectively
 - 12 badminton court sports hall – 8 is enough for University
 - 50m Pool – 25m would be enough for University
 - Diving is low profile – a lot of money for just 20 people
 - Bowling – doesn't blend too well
 - Dance, martial arts and fitness – a need for city
 - Sports science – a necessity for the city, meeting and learning space needed
 - Astro turf – a need for the University.
 - Football pitches needed – 6 pitches required approximate £400k cost
- Potential funding from BLF (Big Lottery Fund) Living Landmarks scheme with £50m and £25m grants being given to various projects throughout the UK
- It is highly unlikely any additional funding for the CPLC would be provided by the University

Marjon

3.19 Marjon are committed to support the development of CPLC as can see the strategic benefits to the City even though currently they would not be a direct user of the facility. They have some excellent sports facilities although some now need investment, and the majority of their requirements are met on campus.

- Principal has had significant experience with University of East Anglia and their Sportspark development.
- Academically, Marjon is a centre of excellence and is very popular.
- In sport, they have the 3 times national University champions of basketball.
- The college is ranked 6th nationally for student satisfaction and they rate highly in all nationally ranked areas.

Section 3 Consultation

- The key academic areas for the college are the IT and Sport, with Health a growth area. Sport makes a higher than average contribution
- Their sports facilities are popular with Plymouth people and community. The estates strategy has identified £3m for facilities by 2008. This can be funded through top up fees
- BUSA Sports are really popular at the University widening participation is seen as a key aim for them
- They currently run the sports aspect of sports management and marine sports on behalf of University of Plymouth
- Marjon as a resident of the city fully supports the project saying it is 'great for the city'
- Potential issue is the impact CPLC may have on their community income stream
- Opportunity with Seaton Pool (Science Park)- RDA want land and Marjon could accommodate existing usage
- At this stage not exactly sure what they want from the facility at Central Park
- There are capacity issues within Marjon and the need to develop current facilities
- The differentiated service range would interest them, although they realise there will become an overlap of facilities
- Very interested in water features and block bookings would be a need of the college – not a priority for the college but it would be nice.
- The future relationship with the University is important particularly in relation to delivering the various sports courses which they do on their behalf. Marjon deliver a significant number of sports related courses contractually to the University, and there is no guarantee this arrangement will remain in perpetuity.
- At this stage it is unlikely any capital funding will be provided for the CPLC from Marjon

PCT

- 3.20 The PCT work closely in partnership with the City Council particularly in delivering corporate objectives as part of the Local Strategic Partnership. There is also some direct operation service linkage with PCC and the leisure department that could be greatly enhanced with the delivery of the CPLC, and the development of joint outcomes in improving participation and health.
- 3.21 A wide range of issues were put forward and these included:
- GP planning services currently in state of flux
 - Strategic need to move towards greater private sector delivery
 - Limited joined up working and strategic planning particularly in relation to capital programming
 - Community care centres being developed in Plymouth but no opportunity to link to Central Park as one being developed at Mount Gould, and seen as too close
 - LIFT delivery option could provide facility although not particularly advantageous for the Authority as will forego asset at end of term
 - New funding stream for Health trainers April 2006
 - LSP not particularly effective in delivering outcomes
 - Local Public Service Agreement signed up to which incorporates a range of health targets and these targets are linked to funding if achieved. This could be linked and support the CPLC
 - Very supportive of CPLC and some real opportunity to contribute positively to improve various health related objectives

Section 3 Consultation

Plymouth Sports Forum Partnership Group

3.22 Capita Symonds led a workshop with the Plymouth Sports Forum considering the issues surrounding the existing provision, the present sport and recreation needs, the vision for CPLC and what are the opportunities, threats for moving. The following is a summary of some of the comments:

- strong support for the development of Central Park
- strong sporting need
- ambition to have an iconic development that has regional significance especially for swimming and diving
- links with Plymouth Football club will be critical
- benefits of other services in the centre, for example sports science and medicine
- there was recognition that existing facilities were too spread out and unable to support local communities

3.23 A list of attendees and the notes from the meeting are included in Appendix B.

Sport England South West

3.24 A telephone interview was held with Louise Teacher from Sport England South West, case manager for a proposed funding application from Plymouth. There was recognition by Sport England of the development and were supportive of a future funding application for the development. The Regional Director, Jim Clark is a member of the Steering Group and has also been positive about the potential development.

3.25 Any funding allocation would be considered under the Community Investment Fund (CIF). However there are a number of a steps Plymouth would need to complete if a funding application were to be considered, although there is recognition that these could be negotiated due to the complexity of the project. Ongoing regular liaison needs to be maintained with Sport England and their relevant regional officers. It is unlikely any further funding over and above the suggested £1.5m figure will be available. A copy of the CIF funding application requirements can be found in Appendix C.

Other Agencies

3.26 A range of other organisations were also consulted in relation to their view on CPLC and some were consulted to acquire further information to support various elements of this study. In general terms there is unparalleled support for the concept and the development at Central Park. Similarly there also appears to be a reasonable amount of interest in commercial leisure opportunities in the area identified within the Master Plan. Other agencies, organisations and individuals consulted included the following-

- South West Regional Development Agency
- South West Tourism
- Devon county Council
- PCC – Tourism and Planning and Regeneration
- Plymouth Premier Hotel Association /Moat House (now Holiday Inn)
- Plymouth Attractions Group
- National Marine Aquarium
- Matchroom Snooker
- Plymouth Pavilions/Theatre Royal Trust

Section 3 Consultation

- Rockeagle Land
- Cine world Cinemas
- Vue Cinemas
- Odeon Cinemas
- National Amusements

Key Findings

- 3.27 The consultation process provides a clear recommendation to pursue the development at Central Park. All partners for varying reasons will benefit from the development and see the strategic and economic benefits for the region, the city and the local community. There is also a clear message from the consultees that something has to change. The status quo, in relation to facility provision, cannot remain. Similarly a wider view needs to be taken of leisure facility provision in Plymouth, not just addressing the Mayflower Centre and Central Park Pools in isolation from city wide provision. This will address the disparate direction in delivery, improve the potential to deliver corporate, regional and national agendas and provide some economic benefit.
- 3.28 The sporting consultation conducted, as part of the 2002 SELF Bid is as relevant today as was then, and the findings were reinforced through the workshop conducted with Plymouth Sports Forum. When the project reaches the next stage in relation to providing a detailed business case and design, further work will need to be carried out with the sporting stakeholders to further detail their requirements and programme requirements.
- 3.29 Additional funding opportunities were explored with the various partners. Other than the existing £3m promised by the University of Plymouth, no other partner funding was identified at this time.

Section 4 Study Area Demography

Introduction

- 4.1 To inform the study we commissioned the Leisure Database Company (LDCo) to analyse the population within a 20 and 60-minute drive time, using 'MOSAIC' profiling.
- 4.2 MOSAIC is one of the leading geo-demographic consumer classification systems. A Mosaic UK type is assigned to each of the c.2 million postcodes in Great Britain. The fourteen households (on average) which share an individual postcode are assigned a Mosaic group and type – the type being the one that best describes the characteristics of those households and the individuals living in them. Mosaic UK assigns one of 61 types and one of 11 groups to each postcode.
- 4.3 A Mosaic UK type is assigned to each household or postcode based upon a large number of statistical measures, originating from different sources and relating either to the individual person, their household, postcode, or higher-level geographical units like Census Enumeration District or postal sector. In total, 350 data items, or variables, are used in the construction of the Mosaic UK classification system. The data is refreshed each year.
- 4.4 From this profile we see not only the total population of the catchment area but also what proportion fall into each mosaic type along with its income profile, household and lifestyle characteristics. This level of detail is a valuable tool when adding significantly more information than the census data.
- 4.5 The essence of the system is that small areas which share similar housing, lifestyle, demographic and socio-economic features will show similar likelihood of using specific services.
- 4.6 The detailed data in the 20 and 60-minute drive times are contained in Appendix D and a description of the demographic profile types is contained in Appendix E.
- 4.7 The original SELF Bid in 2002 developed a needs analysis based on general demographic data from 1991 census, conducted a community demand survey in June 2001, and conducted a strata survey of Year 9's in Plymouth (June 2001/ October 2002) to ascertain levels of participation, awareness and interest in sports facility provision.
- 4.8 The demand survey of 400 respondents at the time concluded the following:
- There is a strong support for new/enhanced sports facilities
 - Support very strong amongst women
 - Three quarters of respondents were of the opinion that women, families and children u-16 would use the new facilities
 - More than half said they would use the facilities more than once a week as long as affordable and offers support provision such as a crèche
 - One third said they would use it more than once a month
 - Half the respondents said their children would use the facilities more than once a week
 - Most likely used facilities included swimming 97%, fitness suites 62%, and keep fit/ aerobics 45%
- 4.9 The SELF submission concludes “the survey demonstrates the importance of Central Park to residents of Plymouth and the role the Council plays in delivering sport and leisure provision. Central Park was used by a significantly higher proportion of

Section 4 Study Area Demography

respondents than any other leisure facility in Plymouth and the results identify the strong support for new/enhanced facilities and indicate there would be a demand for, and frequent usage of facilities.”

Total Population

- 4.10 Within the respective 20 and 60-minute drive times the total population (estimate 2003) is as follows (Table 4.1):

Table 4.1 Population Totals within Drive Times

Drive Time	Population Total
20 minutes	285,603
60 minutes	728,826

- 4.11 The population totals change considerably within the 60-minute drive time catchment even though the surrounding hinterland is predominantly rural. This is as a result of the catchment including the towns of Torquay and Exeter.

Mosaic Profile

- 4.12 For the 20 and 60-minute drive times the Mosaic Profile is as follows (Tables 4.2 and 4.3).

Table 4.2 Mosaic Profile 20 Minutes

	Central Park Pools 20 mins	Central Park Pools 20 mins %	England	England %	Penetration	Index
Mosaic UK groups (Pop)						
A Symbols of Success (Pop)	10,821	3.79	5,382,614	10.83	0.20	35
B Happy Families (Pop)	48,442	16.96	5,663,617	11.40	0.86	149
C Suburban Comfort (Pop)	44,187	15.47	8,661,777	17.43	0.51	89
D Ties of Community (Pop)	51,657	18.09	8,447,863	17.00	0.61	106
E Urban Intelligence (Pop)	20,950	7.34	3,443,079	6.93	0.61	106
F Welfare Borderline (Pop)	15,489	5.42	2,311,029	4.65	0.67	117
G Municipal Dependency (Pop)	23,976	8.39	3,231,165	6.50	0.74	129
H Blue Collar Enterprise (Pop)	39,952	13.99	5,277,273	10.62	0.76	132
I Twilight Subsistence (Pop)	6,076	2.13	1,283,164	2.58	0.47	82
J Grey Perspectives (Pop)	17,406	6.09	3,382,614	6.81	0.51	90
K Rural Isolation (Pop)	3,890	1.36	2,320,012	4.67	0.17	29
Population estimate 2003	285,603	100.00	49,680,686	100.00	0.57	100

Section 4 Study Area Demography

Table 4.3 Mosaic Profile 60 Minutes

	Central Park Pools 60 mins	Central Park Pools 60 mins %	England	England %	Penetration	Index
Mosaic UK groups (Pop)						
A Symbols of Success (Pop)	23,178	3.18	5,382,614	10.83	0.43	29
B Happy Families (Pop)	95,762	13.14	5,663,617	11.40	1.69	115
C Suburban Comfort (Pop)	108,423	14.88	8,661,777	17.43	1.25	85
D Ties of Community (Pop)	127,775	17.53	8,447,863	17.00	1.51	103
E Urban Intelligence (Pop)	29,919	4.11	3,443,079	6.93	0.87	59
F Welfare Borderline (Pop)	21,132	2.90	2,311,029	4.65	0.91	62
G Municipal Dependency (Pop)	34,129	4.68	3,231,165	6.50	1.06	72
H Blue Collar Enterprise (Pop)	82,995	11.39	5,277,273	10.62	1.57	107
I Twilight Subsistence (Pop)	16,490	2.26	1,283,164	2.58	1.29	88
J Grey Perspectives (Pop)	113,153	15.53	3,382,614	6.81	3.35	228
K Rural Isolation (Pop)	70,371	9.66	2,320,012	4.67	3.03	207
Population estimate 2003	728,826	100.00	49,680,686	100.00	1.47	100

4.13 The full MOSAIC Reports are contained in Appendix D, and these show the further breakdown of each of the 11 MOSAICS into further sub-sets.

Key Findings

4.14 The MOSAIC, as illustrated in Table 4.4 highlights the following dominant profiles within the 20-minute drive time:

- Happy Families
- Welfare Borderline
- Municipal Dependency and
- Blue Collar Enterprise

Table 4.4 MOSAIC Dominant Profiles – 20 Minute Drive Time

Mosaic	20
Happy Families	149
Blue Collar Enterprise	132
Municipal Dependency	129
Welfare Borderline	117

4.15 The MOSAIC, as illustrated in Table 4.5 highlights the following dominant profiles within the 60-minute drive time:

- Happy Families
- Blue Collar Enterprise
- Grey Perspectives and
- Rural Isolation

Table 4.5 MOSAIC Dominant Profiles – 60 Minute Drive Time

Mosaic	60
Grey Perspectives	228
Rural Isolation	207
Happy Families	115
Blue Collar Enterprise	107

Section 4 Study Area Demography

4.16 The two tables (4.4 and 4.5) show a significant shift in population characteristics between the two drive times. Within the suburban area of Plymouth the population demographics are typical in respect of a City Centre suburban area. However, beyond this drive time up to the 60-minute band there is a change in the make up of the population. The rural surrounding areas of Devon, Cornwall, Dorset and Somerset can all be reached within an hour drive. As you can see from the table above, Grey Perspectives and Rural Isolation are over represented compared to the national norm, as one moves away from the City.

4.17 The characteristics of these dominant MOSAIC groups are summarised below:

Happy Families

4.18 Happy Families contains people whose focus is on career, home and family. These are mostly younger age groups who are married, or at least in a permanent relationship, and are now raising children in post war family houses, often in areas of the country with rapidly growing populations. The focus of expenditure is on equipment for the home and garden, and the immediate family unit is the principal focus of leisure activities.

4.19 This population, therefore, consists mostly of young couples with pre-school and school age children, living in relatively recently built family accommodation, some detached, other semi-detached on new estates often some considerable distances from the cores of major commercial centres but within an easy drive of many potential work places.

4.20 Leisure is likely to involve active sports such as squash and badminton to those taking more time, such as golf. Walking, sailing and mountain climbing are relatively more popular pursuits than the theatre, the cinema and dining out. Holidays may involve camping or caravanning and are more likely to take independent formats – for example, self-catering cottages rather than coach tours or hotel packages – and frequently include opportunities for engagement in active sports and special interests.

4.21 This is the biggest market segment in the key drive time catchments for a leisure facility which will impact on the potential use of Central Park. This is a good indicator to support individual usage such as fitness and family usage of facilities, particularly swimming and ice. This group is also very aware of the need to maintain health and well being through sports participation and active lifestyles.

Welfare Borderline

4.22 Welfare Borderline is comprised of many people who are struggling to achieve the material and personal rewards that are assumed to be open to all in an affluent society. Few hold down rewarding or well paying jobs and, as a result, most rely on the council for their accommodation, on public transport to get around and on state benefits to fund even the bare essentials. The lack of stability in many family formations undermines social networks and leads to high levels of anti social behaviour among local children.

Section 4 Study Area Demography

Municipal Dependency

- 4.23 Municipal Dependency mostly contains families on lower incomes who live on large municipal council estates where few of the tenants have exercised their right to buy. Often isolated in the outer suburbs of large provincial cities, Municipal Dependency is characterised as much by low aspirations as by low incomes. Here people watch a lot of television and buy trusted mainstream brands from shops that focus on price rather than range or service.

Blue Collar Enterprise

- 4.24 Blue Collar Enterprise comprises people who, though not necessarily very well educated, are practical and enterprising in their orientation. Many of these people live in what were once council estates but where tenants have exercised their right to buy. They own their cars, provide a reliable source of labour to local employers and are streetwise consumers. Tastes are mass market rather than individualistic and focus on providing comfort and value to family members.

Grey Perspectives

- 4.25 Grey Perspectives consists mostly of pensioners who own their homes and who have some source of income beyond the basic state pension. Many of these people have, on retirement, moved to the seaside or the countryside to live among people similar to themselves. Today many of these people have quite active lifestyles and are considered in their purchasing decisions. *Grey Perspectives* is located mostly around the coast of Britain, particularly along the South coast between Clacton and Torbay.

Rural Isolation

- 4.26 Rural Isolation contains people whose pattern of living is distinctively rural. They live not just outside major population centres but also deep in the countryside, in small communities which have been little influenced by the influx of urban commuters. These are places where people with different levels of income share attachments to local communities, and where engagement with the community and with the natural environment is more important to most residents than material consumption.
- 4.27 Leisure activities are much influenced by access or lack of access to different facilities. They are more likely to be attracted to a major centre, or destination for fulfil their leisure needs.

Leisure Behaviour

- 4.28 To further understand how people within the catchment areas spend their existing leisure time we also commissioned TGI Leisure Reports for the 20 and 60-minute catchments.
- 4.29 Established in 1969, the Target Group Index (TGI) is a continuous survey which measures product usership, media exposure and attitudes in order to describe as accurately as possible the characteristics of target groups of consumers, and the potential strategies that enable subscribers to communicate with those audiences.
- 4.30 The Target Group Index is compiled annually by the British Market Research Bureau. Y=TGI contains the results of a survey of around 25,000 consumers. Every respondent to the survey is asked a consumer-related question including the sports

Section 4 Study Area Demography

they take part in. The questions are framed in terms of 'do you take part in or play yourself these days.....?'

- 4.31 The detailed TGI reports for 20 and 60-minute drive times are contained in Appendix F. The following tables show the summary data for the drive times for Sports Participation Table 4.6 and Other Activities Table 4.7. The figures highlighted in yellow are activities in which participation is above the national average.

Table 4.6 Sports Participation

Sports Taken Part In	Index Figure	
	20 Minute Drive Time	60 Minute Drive Time
Football (Association)	111	96
Athletics	95	88
Badminton	101	97
Basketball	94	86
Billiards	103	92
Bowls	93	101
Boxing	103	90
Chess	106	97
Cricket	101	91
Cycling	101	102
Darts	107	102
Fishing	103	104
Golf	100	100
Marathon Running	106	96
Motor-Cycle Racing	101	97
Rugby League	113	99
Rugby Union	97	94
Sailing / Yachting	96	104
Show Jumping	107	112
Skating	104	93
Skiing	98	98
Snooker	103	97
Squash	107	99
Stock Car Racing	100	96
Swimming	101	99
Table Tennis	101	98
Tennis	101	100

Table 4.7 Other Activities

Activities Taken Part In	Index Figure	
	20 Minute Drive Time	60 Minute Drive Time
Bingo (in a club)	112	100
Camping	107	105
Climbing / Mountaineering	98	103
Dancing (admission fee)	105	101
Football Pools	102	98
Horse Riding	94	101
Aerobics / Keep Fit	101	97

Section 4 Study Area Demography

Walking / Rambling	98	104
Shooting (Game / Rough)	99	109
Shooting (Clay / Target)	95	105
Ten-pin Bowling	108	101
Weight Training	104	98
Placing a Bet	108	98
National Lottery Every Week (Wednesday)	103	100
National Lottery Every Week (Saturday)	100	99
National Lottery Instants	104	100
Yoga	99	98
National Lottery	102	100
Shooting	100	114

- 4.32 This is a snap shot of current consumer behaviour in the local catchment areas. With few exceptions within the 20-minute drive time, sports participation in many sports is above the national average (index 100). The 60-minute drive time shows a different position with only 6 of the 27 sports categories above the national average. As one would expect with the demographic profile of this catchment area, these include very rural associated sports such as show jumping, sailing / yachting, cycling and fishing.
- 4.33 The other activities table within the 20-minute drive time show a similar position with many activities above the national average. This identifies that Plymouth City has a very broad sports and activity range with equally good participation levels. Within the 60 minute catchment area the trend changes with under half of the activities below the national average with again, mainly rural associated activities above the average such as shooting, horse riding, walking / rambling, climbing / mountaineering and Camping.
- 4.34 This data further supports the ongoing delivery of leisure provision at Central Park without raising too many expectations of a significant untapped market. Better quality provision, good marketing and additional provision should provide a great opportunity to raise the profile, awareness, participation and economic benefits of a new Central Park Leisure Facility.

Section 5 Market Review

- 5.1 To support the outline business case development we conducted a thorough supply survey of all related leisure provision. This research covered a wide range of leisure pursuits and provided a more detailed analysis of the local health and fitness market, as this element is proposed to be key element of the facility mix for the new CPLC.
- 5.2 The following provision was identified and listed by type, the number and the specific operation or trading name:
- Athletics tracks
 - Health and fitness suites
 - Ice rinks
 - Indoors bowls
 - Indoor tennis centres
 - Ski slopes
 - Sports halls
 - Swimming pools
 - Synthetic turf pitches
- 5.3 The analysis was completed for distances of 1 mile, 3 miles, 5 miles, 10 miles and 25 miles radius from Central Park. This was then extended following discussions with Asset Management's project managers to include 40 miles, so incorporating Torbay and surrounding area. The detailed analysis can be found in Appendix G.
- 5.4 The general analysis supports a further development at Central Park, as there are no significant issues with regard to competition.
- 5.5 An analysis of the planning position was also undertaken and it did not identify any future planned provision with the exception of the Brickfields Development. It is envisaged that this development will not effect any future business projections for Central Park, primarily through size and distance from Central Park.

Health and Fitness Competition Analysis

- 5.6 In order to assess health and fitness provision within Plymouth City we analysed the Sport England Active Places website to identify facilities that are in the catchment area. The postcode for the Central Park Pools (PL2 3DG) was used and we sought to identify all provision within a 5-mile radius of this postcode. We identified a total of 25 health and fitness facilities. The facilities were in mixed ownership, some were commercially owned and some were managed by local authorities.
- 5.7 Table 5.1 below identifies each facility and provides information on owner / management type, access policy, number of health and fitness stations (items of equipment) and the mileage from the designated postcode area of the Central Park Pools (PL2 3DG).

Section 5 Market Review

Table 5.1 Health and Fitness Suites in Plymouth City

Plymouth City Health and Fitness Facilities				
Site Name	Owner Type / Management Type	Access Policy	Number of Stations	Miles from Central Park Pools
Mayflower Leisure Centre	Local Authority	Pay and Play	17	0.15
The Fabb Exercise Centre	Commercial	Registered Member Use	23	0.63
Le Club at Cophorne Hotel	Commercial	Registered Member Use	8	0.8
YMCA (Plymouth Triangle Centre)	YMCA	Pay and Play	42	0.87
University of Plymouth Fitness Complex	HE Institution / In House	Pay and Play	36	0.89
Bodylines Gym and Sunbed Centre	Commercial	Pay and Play	40	1.03
Plymouth Health Studio	Commercial	Pay and Play	21	1.04
Club Motivation (Plymouth)	Commercial	Pay and Play	24	1.27
YMCA (Plymouth Kitto Centre)	YMCA	Pay and Play	38	1.29
Body Ace Health Studio	Commercial	Pay and Play	30	1.36
Lipson Sports Centre	Community School / In House	Pay and Play	14	1.51
Cannons Health Club (Plymouth)	Commercial	Registered Member Use	86	1.75
The Gym	Commercial	Pay and Play	26	1.93
Sir John Hunt Sports Centre	Community School	Pay and Play	16	2.44
Fort Stamford Health and Fitness	Commercial	Registered Member Use	65	2.48
Derriford Health and Leisure Centre	Health Authority	Pay and Play	33	2.84
Devonshire Health and Racquet Club	Commercial	Registered Member Use	110	2.94
Estover Sports Centre	Community School / In House	Pay and Play	7	3.03
Marjon Sport and Leisure	HE Institution / In House	Pay and Play	25	3.17
HMS Raleigh Gynasium	Ministry of Defence	Sports Club / Community Association	35	3.21
Plymstock School Sports Centre	Community School / In House	Pay and Play	16	3.24
Saltash Leisure Centre	Local Authority	Pay and Play	35	3.53
China Fleet Country Club	Commercial	Registered Member Use	75	3.83
Ridgeway Community Sports Centre	Community School / In House	Pay and Play	12	4.51
Elfordleigh Hotel Golf and Leisure Club	Commercial	Registered Member Use	24	4.94

- 5.8 Within the 5 mile radius we estimate there are 858 stations. Taking the 20 minute catchment population of 285,000 this is a ratio of 1 station per 3,332 head of population. Of the 25 facilities, 17 are on a pay and play basis providing access to all the community. Seven of the facilities are for registered member use and there is one facility that limits access to a sports club and community association.
- 5.9 The facilities are in general quite small with most having less than 40 stations. The four facilities that have more than 40 stations are all privately owned and managed. These are:
- Cannons Health Club (Plymouth) – 86 stations
 - Fort Stamford Health and Fitness – 65 stations
 - Devonshire Health and Racquet Club – 110 stations
 - China Fleet Country Club – 75 stations.
- 5.10 These four facilities are all significantly larger than the remaining supply. These are all registered member facilities. There is no large, quality provision in the City for pay and play users. The Central Park Life Centre would have a health and fitness suite to support both pay and play and a membership and is envisaged would be a quality facility of around 150 stations, providing access at an affordable price.
- 5.11 Currently, Local Authority provision is limited with the Mayflower Leisure Centre operating a small health and fitness suite and Saltash Leisure Centre operating a 35-

Section 5 Market Review

station facility. Brickfields stadium, which is currently being redeveloped is not included on this list. The plans include a 40-station health and fitness suite. The facility is scheduled to be open by the end of March 2006.

Pricing

- 5.12 In order to gain an understanding of the different pricing structures that are in place, a sample analysis was produced on membership and pay and play prices and how they differed throughout the City. A varied sample of differing operations is table 5.2.

Table 5.2 – Sample Membership Pricing

Sample Membership Pricing					
Health and Fitness Centre	Membership	Price	Pay and Play	Price	Joining Fee
Mayflower Leisure Centre	Yes - Monthly	£ 17.50	Yes - Casual Usage	£ 3.50	No
Bodylines Gym and Sunbed Centre	Yes - Monthly	£ 32.50	Yes - Daily Price	£ 4.00	No
Club Motivation (Plymouth)	Yes - Monthly	£ 41.50	Yes - Daily Price	£ 10.00	Yes - £20.00
Cannons Health Club (Plymouth)	Yes - Monthly		No		Yes
Devonshire Health and Racquet Club	Yes - Monthly		No		Yes
University of Plymouth	Yes - Monthly	£ 24.00	No		No
Sir John Hunt Sports Centre	Yes - Monthly	£ 15.00	Yes - (membership required)	£ 2.00	Yes - £17.50 per annum
Please Note: Prices Based on Adults					

- 5.13 The monthly membership fee shows a significant difference between the commercial facilities, Local Authority and educational provision. The figure is almost double in some cases. This can be explained by the difference in facility mix and quality of facilities that commercial health and fitness facilities provide.
- 5.14 Pay and play usage is available at most facilities, however access is different and sometimes difficult at some of the private members facilities where a daily entrance fee is charged up to £10.00 for one visit. This compared with as little as £2.00 at the public facility. This illustrates the different pricing strategies adopted by the different management types.

Key Findings

- 5.15 The health and fitness market analysis identifies a lack of high quality, affordable public sector managed supply to compete with, and tempt members away from Private Clubs. We believe that a new 150 station facility at the CPLC can meet a gap in the existing market supply.

Section 6 Development Options and Business Planning

- 6.1 As highlighted in earlier sections the future development of CPLC is dependant on a number of variables including strategic need, capital investment, partner involvement, political will and sustainability. Sustainability is crucial in the ongoing delivery of an effective service, with continued provision for investment and improvement to maintain a high quality building for 25 plus years.
- 6.2 The overall situation in Plymouth with regard to the poor state of its leisure stock is not dissimilar to a number of other authorities, and a common theme nationally. DCMS estimate that the capital liability for publicly owned leisure facilities is £4.5bn as most of the stock is now between 20-40 years old. There is also an estimated requirement of £550m just to keep facilities open over the next 5 years. The need to provide a robust and sustainable business case, is vital at this stage.
- 6.3 As part of this project the business planning process for CPLC has been developed with cognisance of sustainability and a range of other factors. In particular the consultation process, the market review, partners needs, demographic assessment, our experience of similar studies and operational knowledge of leisure facility management both in the public and private sectors.
- 6.4 This section is comprised of the following sub-sections:
- Facility mix and requirements
 - Facility mix capital costing
 - Business plan financial models
 - Business plan assumptions

Facility Mix and Requirements

- 6.5 A key consideration in developing the CPLC is to replace the two existing facilities on Central Park. In principle this is the case with swimming, diving, health and fitness and indoor bowls and this has been the base starting point.
- 6.6 There has been a considerable amount of work done by the Council's Project Manager to evaluate the various facility options, incorporate partners requirements, instill the corporate vision of destination Central Park and work with our project team to define potential options for improvement. Appendix A details the general facility and project requirements identified by the project partners.
- 6.7 A working group incorporating partners representatives particularly with a technical knowledge of sport and leisure, developed a 'space planning' programme to identify key elements of the proposed provision. The Project Manager prepared some initial elemental costings.
- 6.8 The proposed facilities included:

Dry Sports Building

- 12 badminton court hall
- Changing facilities –Internal and external (for pitch use)
- Activity room - dojo/ martial arts/dance studio
- Teaching spaces
- Treatment rooms
- Fitness suite
- Health suite

Section 6 Development Options and Business Planning

- Meeting/ conference room
- Administration areas
- Reception area
- Catering outlet and
- Storage

Wet Sports Building

- 50m Olympic Pool 10 lanes, movable floor, and booms
- Teaching Pool
- Diving Pool – springboards and platform
- Spectator seating
- Changing
- Storage

Bowling Centre

- 8 rink bowling centre
- Changing
- Kitchen
- Storage
- Viewing area

Ice Arena

- Olympic size ice rink (1800m2)
- Changing
- Reception points
- Spectator seating

- 6.9 The 'space planning' and initial cost plan can be found in Appendix H. Some amendments have been made throughout the duration of the project but essentially we have based our detailed capital costing and facility mix for business planning purposes on this exercise.
- 6.10 There has been no detailed designs produced at this stage and limited architectural input into the facility design, the capital costs are based on this exercise (Appendix H). We have utilised our internal architects Capita Percy Thomas, to produce a relationship diagram that we have referred to whilst developing the business plan. This provides a picture of the various facility elements and their relationship with each other. We tend to use this with architects on facility mix/feasibility projects to gain an appreciation of space planning and operational delivery requirements, and it will aid good quality design that meets the needs of the Client. This would be ideal to use as part of the development of the detailed business case. Appendix I contains the relationship diagram for CPLC.
- 6.11 The authorities internal architects have been involved in developing the overall Masterplan for Central Park which obviously includes the area designated for CPLC, and any 'commercial leisure' development opportunity. This Master Planning process in conjunction with the preparation of the Local Development Framework has been running in parallel to this 'outline business case development.'

Section 6 Development Options and Business Planning

Capital Costings

- 6.12 The capital costings as highlighted earlier were based on the initial space allocation and facility mix and were produced by the Capita Symonds Cost Management Office in Bristol. They are also currently contracted separately to deliver the cost planning on the PCFC Stadium development at Home Park.
- 6.13 The initial costings are based on 4th Quarter 2005. A summary is contained in Table 6.1 below. The detailed breakdown of the costs can be found in Appendix J.

Table 6.1 CPLC Capital Costs 4th Quarter 2005

City of Plymouth Central Park Life Centre

Feasibility Estimate Building - Summary

Element	£	
Building - Dry Sports	8,268,095.61	
Building - Wet Sports	12,301,857.39	
Building - Bowling Centre	3,126,600.67	
Ice Arena	8,695,239.28	
Public Realm Works	600,000.00	As before
Transport/Infrastructure Works	600,000.00	As before
TOTAL	33,591,792.94	

Notes

Plant areas appear to be tight

Circulation spaces may be generous

Excluded:

- Sports equipment, general equipment, furniture covered by Provisional values
- Site clearance/demolition
- Statutory services diversions
- VAT
- Clearance of severe ground contamination
- Abnormal substructure requirements
- Tender inflation beyond 4Q 2005

Section 6 Development Options and Business Planning

- 6.14 In order to project the actual cost mid-way through construction we have costed the development in the 4th Quarter 2007. The summary details are presented below.

Table 6.2 CPLC Capital Costs 4th Quarter 2007

**City of
Plymouth**

2007

Central Park Life Centre

Feasibility Estimate

Building - Summary

Element	£	
Building - Dry Sports	9,119,709	
Building - Wet Sports	13,568,949	
Building - Bowling Centre	3,448,641	
Ice Arena	9,590,849	
Public Realm Works	661,800	As before
Transport/Infrastructure Works	661,800	As before
TOTAL	37,051,748	

Notes

Plant areas appear to be tight

Circulation spaces may be generous

Excluded: Sports equipment, general equipment, furniture covered by Provisional values
Site clearance/demolition
Statutory services diversions
VAT
Clearance of severe ground contamination
Abnormal substructure requirements

- 6.15 Appendix J only shows the detail costs from 4th Quarter 2005. These costs for 2007 are based on construction inflation of 10.3%.

Capital Cost for Community Ice Facility

- 6.17 We were asked to cost a community ice rink facility in order to compare the capital cost with a full Olympic size rink installation. The capital cost for this facility which includes 1200m² of ice (rather than 1800m²), workshop, storage, skate hire,

Section 6 Development Options and Business Planning

circulation and **no** seating is **£4,412,000**. This is the cost at 4th quarter 2007 and has been used in one of the affordability models in the following Section 7.

CPLC Business Plan and Financial Modelling

- 6.18 This section clearly sets out the core business planning for the CLPC and its range of facilities. It models robust and substantiated income and expenditure figures for a brand new facility, on the Central Park site as identified in the Master Plan.
- 6.19 There are some broad principles that we have adopted for the business plan and these include:
- Awareness of the demographics, mosaic profiling and TGI leisure behaviour analysis. Demand analysis from the previous lottery bid
 - Cognisance of the other leisure provision locally, and regionally and patterns of usage as identified in Section 5 of this report
 - Existing pricing patterns, usage patterns and financial performance of Mayflower Leisure Centre, Pavilions and Central Park Pools
 - Facility mix developed
 - Partners needs and requirements particularly University of Plymouth with sportshall space
 - The need to include targeted programmes in line with the Authorities Corporate objectives and those of the Sport Plan 2020
 - Flexibility of design
 - Community need for a quality new leisure facility
 - Business plans are based on 2005/6 position. The figures are indicative and further work will need to be done to further develop the base and test the assumptions

Business Plan Assumptions

General

- 6.20 Our general assumptions are as follows:
1. The model is designed to provide a realistic and indicative comparison, and it should be noted a number of other variables could influence the final outcome which include procurement route, increase in the rate of inflation, further increase in energy costs, increased competition and single status/single tier workforce, specific contract or funding agency outcomes etc.
 2. All figures are shown net of VAT.
 3. All models do not show NNDR (National Non-Domestic Rates) for ease of comparison. A Trust operational delivery vehicle would remove at least 80% of this cost with the other 20% being discretionary by the Local Authority.
 4. To support the sustainability position Lifecycle costs have been built into the operational business plans for each constituent element. This is based on 4th quarter 2005 and at 35% of the capital cost divided by 25 years.
 5. Benchmarking on certain financial elements have been used such as the Ice Arena and 50m pool.

Section 6 Development Options and Business Planning

6. There is a depreciated equipment cost built in for loose items which would **not** be included in the capital cost, - Table 6.9.

Detailed Assumptions

6.21 Assumptions made relating to the CPLC are as follows:

1. The income streams are based on activity areas and physical spaces. For example the fitness suite income is memberships and casual admissions. The sports hall income will incorporate sports hall, course income, children's parties and activities.
2. Income streams are realistic but very conservative.
3. Pricing is based on a comparable pricing structure to the existing centres. Gym membership is higher and incorporates a Direct Debit monthly payment of £32.
4. No firm commitment of usage has been acquired for additional Education use however it is likely to be higher than current based.
5. Programming is key to maximising the water space within the pool, and we have based the utilisation on existing programmes, comparisons to other 50m pools, club and event programmes and the benefit of having 2 booms and a movable floor
6. Vending and catering sales are based on a 40% gross profit margin.
7. Sportshall income incorporates all activities including non-sporting hires, and conservatively little commercial hire income for events, fairs etc. has been built in. Utilisation of space and time analysis has been used for this process.
8. Income growth on the ten year plan shows inflationary increase of 3% with some more sensitive income streams at 2%.
9. Depreciation of equipment, particularly Health and fitness equipment is built in see Table 6.9. These costs have been depreciated over 4 years as per the industry norm, and the Table also shows the net book value (NBV) year on year.

Staffing

6.22 Assumptions made in relation to CPLC Centre Expenditure are detailed below:

1. The staffing figures are based on all-inclusive rates of pay i.e. no enhanced rates for weekends, unsocial hours or shift allowance. The rates stipulated are based on the industry norm.
2. The salaries and rates of pay can be seen from the Staffing Designation and Cost table 6.10.
3. NI contribution has been based on the existing average % contributions.

Section 6 Development Options and Business Planning

4. Holiday cover has been built directly into the staffing costs and not as an additional on-cost.
5. Pension allowance has been built in at 9% as a commercial operation. This takes account of not all employees being in the pension scheme and a recognition of a TUPE transfer of existing staff.
6. The staffing model has allocated all the management, administration and reception costs into the sportshall business plan on the basis this could be procured / phased first. The additional management/ technical requirements to support the other areas have been allocated separately.
7. Fitness costs are in the sportshall plan and catering costs in the swimming pool. No catering provision included unless pool built. Catering more cost effective with significantly higher throughput. Only vending provision if sportshall only is built.
8. Recreation assistant staffing has been based on opening hours, facility mix, water area, general programming assumptions and industry best practice.
9. Recreation assistants would be responsible for a considerable element of cleaning particularly pool related.
10. If the sportshall alone was developed, some remodelling of the staffing could be done, including the managers salary.

6.23 Assumptions made relating to general expenditure:

1. Capital costs of purchasing IT, fitness equipment and major loose sports equipment have been built into the forecast and depreciated over 4 years. The Authority may choose to procure this capital purchase in other ways in order to reduce the annual operational subsidy such as internal or external leasing. As an alternative it may choose a profit share with a fitness provider for the gym kit or potentially use the investment requirement as part of the negotiations with the existing or new facility operator.
2. Energy costs are based on comparable sized facilities and on modern high energy efficient building design. Recognition of the current increasing utility pricing has been incorporated.
3. All of the cardio-vascular fitness equipment with the exception of the treadmills will be self powered so not requiring an electric supply.
4. Business plan allows for year on year inflation at 3%.
5. All expenditure is shown net of VAT.
6. Maintenance costs may appear slightly low but there is an annual lifecycle cost built in. Limited cost should be expended in year one due to warranties and guarantees on plant, equipment and buildings.
7. All other general expenditure items have been benchmarked against other facilities, existing Plymouth facilities and industry standards.

Section 6 Development Options and Business Planning

Table 6.3 Business Plan - 50m Pool

Plymouth Central Park Life Centre - Year 1 Forecast		Table 6.3
EXPENDITURE SCHEDULE		Swimming Pool
Item	Description	
Labour Costs	Salaries	155,740
	Wages	178,694
Equipment and Materials	Maintenance	4,000
	Replacement of Equipment	8,000
Utilities and Power	Electricity	35,000
	Gas	42,000
	Water & Sewerage	22,000
Maintenance/Engineering	Buildings Maintenance - Sched.	10,000
	Buildings Maintenance - Unsched.	7,000
	Plant Maintenance- Sched.	10,000
	Plant Maintenance- unsched.	7,000
	Grounds	2,500
Staff costs	Uniform	5,000
	Recruitment	3,500
	Travel	750
	Staff Training	8,000
Other Costs	Telephones	1,000
	Advertising, Marketing & Publicity	4,000
	Stationery & Postage	2,500
	Photocopying/Printing	2,000
	Fixtures & Fittings	1,000
	Insurance	8,000
	NNDR	0
	Licences	4,000
	Cleaning Materials	6,000
	Chemicals	11,000
	Vending Machine Hire	2,600
	Vending Supplies	9,000
	Catering Supplies	38,400
	Goods For Resale	7,200
	Cash Collection	0
	Refuse Collection	0
	Performance Bond	0
	Credit Card Charges	200
	Computer Maintenance	1,000
	Service Contracts	4,000
	Depreciation	5,000
	Start Up Costs	0
	Lifecycle Costs	200,600
Total Expenditure		806,684
INCOME		
	Memberships	26,655
	Casual gym admissions	0
	Swimming Admissions	360,000
	Ice Admissions	
	Ice discos	
	School	30,000
	Lessons	80,000
	Pool hire/Clubs	59,520
	Events	25,000
	Sports Hall	0
	Sports Hall Events	0
	Dance Studio	0
	Children's Holiday Activities	3,500
	Courses	0
	Bowls	0
	Hire	0
	Equipment Hire	1,000
	Childrens Parties	5,957
	Catering	96,000
	Vending	18,000
	Machines income	1,400
	Resale	12,000
	Advertising/Sponsorship	10,000
Total Income		729,033
Net Surplus/Deficit		-77,651

Section 6 Development Options and Business Planning

Table 6.4 Business Plan – Sports Hall

Plymouth Central Park Life Centre - Year 1 Forecast		Table 6.4
EXPENDITURE SCHEDULE		Sports Hall Arena
Item	Description	
Labour Costs	Salaries	341,122
	Wages	125,862
Equipment and Materials	Maintenance	8,000
	Replacement of Equipment	7,000
Utilities and Power	Electricity	15,000
	Gas	12,000
	Water & Sewerage	6,000
Maintenance/Engineering	Buildings Maintenance - Sched.	4,000
	Buildings Maintenance - Unsched.	3,000
	Plant Maintenance- Sched.	4,000
	Plant Maintenance- unsched.	3,000
	Grounds	2,500
Staff costs	Uniform	2,500
	Recruitment	1,000
	Travel	500
	Staff Training	3,500
Other Costs	Telephones	5,000
	Advertising, Marketing & Publicity	4,000
	Stationery & Postage	2,000
	Photocopying/Printing	2,000
	Fixtures & Fittings	1,000
	Insurance	5,000
	NNDR	0
	Licences	6,000
	Cleaning Materials	3,000
	Chemicals	0
	Vending Machine Hire	3,900
	Vending Supplies	11,000
	Catering Supplies	0
	Goods For Resale	1,800
	Cash Collection	2,800
	Refuse Collection	2,500
	Performance Bond	0
	Credit Card Charges	1,000
	Computer Maintenance	3,000
	Service Contracts	4,000
	Depreciation	135,000
	Start Up Costs	0
	Lifecycle Costs	117,000
Total Expenditure		848,984
INCOME		
	Memberships	354,000
	Casual gym admissions	36,460
	Swimming Admissions	0
	Ice Admissions	
	Ice discos	
	School	55,000
	Lessons	0
	Pool hire/Clubs	0
	Events	0
	Sports Hall	95,000
	Sports Hall Events	24,000
	Dance Studio	45,000
	Children's Holiday Activities	4,000
	Courses	55,000
	Bowls	0
	Hire	7,800
	Equipment Hire	2,000
	Childrens Parties	11,915
	Catering	0
	Vending	22,000
	Machines income	1,200
	Resale	3,000
	Advertising/Sponsorship	15,000
Total Income		731,374
Net Surplus/Deficit		-117,609

Section 6 Development Options and Business Planning

Table 6.5 Business Plan - Ice

Plymouth Central Park Life Centre - Year 1 Forecast		Table 6.5
EXPENDITURE SCHEDULE		Ice
Item	Description	
Labour Costs	Salaries	56,306
	Wages	216,808
Equipment and Materials	Maintenance	17,000
	Replacement of Equipment	15,000
Utilities and Power	Electricity	40,000
	Gas	30,000
	Water & Sewerage	7,000
Maintenance/Engineering	Buildings Maintenance - Sched.	10,000
	Buildings Maintenance - Unsched.	6,000
	Plant Maintenance- Sched.	10,000
	Plant Maintenance- unsched.	7,000
	Grounds	2,500
Staff costs	Uniform	10,000
	Recruitment	1,000
	Travel	500
	Staff Training	6,000
Other Costs	Telephones	3,000
	Advertising, Marketing & Publicity	4,000
	Stationery & Postage	2,000
	Photocopying/Printing	1,000
	Fixtures & Fittings	1,000
	Insurance	10,000
	NNDR	0
	Licences	0
	Cleaning Materials	2,500
	Chemicals	1,000
	Vending Machine Hire	1,300
	Vending Supplies	8,000
	Catering Supplies	0
	Goods For Resale	3,600
	Cash Collection	0
	Refuse Collection	0
	Performance Bond	0
	Credit Card Charges	0
	Computer Maintenance	1,000
	Service Contracts	4,000
	Depreciation	17,500
	Start Up Costs	0
	Lifecycle Costs	70,000
Total Expenditure		565,014
INCOME		
	Memberships	16,851
	Casual gym admissions	0
	Swimming Admissions	
	Ice Admissions	425,532
	Ice discos	33,511
	School	0
	Lessons	19,149
	Pool hire/Clubs	0
	Events	20,426
	Sports Hall	0
	Sports Hall Events	0
	Dance Studio	0
	Children's Holiday Activities	4,085
	Courses	0
	Bowls	0
	Hire	38,298
	Equipment Hire	0
	Childrens Parties	15,319
	Catering	0
	Vending	16,000
	Machines income	0
	Resale	6,000
	Advertising/Sponsorship	10,000
Total Income		605,170
Net Surplus/Deficit		40,156