



SPORTS

UPDATE

Keeping up
with Demand:
an Analysis of Facility
Provision in Wales



THE SPORTS
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FOR WALES

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CONTENTS

INTRODUCTION	4
SPORTS HALLS	4
SWIMMING POOLS	5
GOLF COURSES	6
SQUASH COURTS	7
INDOOR BOWLING RINKS	8
ATHLETICS TRACKS	8
ARTIFICIAL TURF PITCHES	9
CONCLUDING REMARKS	9
ACKNOWLEDGEMENT	10
REFERENCES	10
ANNEX 1	10



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INTRODUCTION

The Facilities Planning Model was first applied to Wales in the mid 1980’s as part of the Sports Council for Wales’ (SCW) first National Strategy ‘Changing Times, Changing Needs’. The model has been used periodically since then to re-evaluate the level of sports facility provision in Wales and the results have been made available through a range of publications; most recently in 1997 (1,2,3,4). A brief outline of how the model works is provided in Annex 1.

This report summarises the results of the latest Facilities Planning Model runs for sports halls, swimming pools, golf courses, squash courts, indoor bowling rinks, synthetic athletics tracks and artificial turf pitches. This information should help in providing guidance on facility provision for SCW, Local Authorities and others involved in planning the provision of sports facilities. It should be emphasised that the results from the model can only provide part of the picture and need to be used in conjunction with local knowledge. These latest results incorporate the use of travel times for each facility type used in conjunction with the road network. This is considered to provide more realistic results than the fixed catchment areas previously used, which may have led to an underestimate of unmet demand for some facility types.

The results presented in this report are best interpreted within the context of wider issues including:

- the increasing participation levels in sport in Wales and SCW targets for future increases (5);
- decisions which need to be made on the replacement or refurbishment of facilities nearing the end of their useful life;
- the cost implications of running new facilities at a time when many local authorities are finding it difficult to afford to maintain or replace their existing stock of facilities;
- new funding opportunities.

SPORTS HALLS

A number of key issues should be highlighted as regards the results for sports halls

- because a number of sports hall activities require a minimum three badminton court hall, facilities with a main hall below this size have been excluded from the analysis. This has the effect of lifting the standard of



- sports halls to that which is felt to be appropriate for the modern era;
- ancillary halls less than 144 square metres have been excluded from the analysis;
 - the small number of additional sports halls opened since 1997 has been partly outweighed by the closure to public use of several existing halls;
 - a significant number of halls have reduced their opening hours to the public during the peak period, thereby reducing their capacity in the Planning Model run.

These factors, in addition to the model’s use of travel times in place of fixed catchment areas and higher percentage demand rates, have had the effect of increasing unmet demand for sports halls since 1997 from 20.9% to 40.8% (Table 1).

This figure relates to a higher quality of provision, with some unmet demand undoubtedly being met, albeit at a lower than desirable standard, in one and two court halls. It is also worth noting that demand is increasing, with the latest SCW adult participation survey recording an increase in participation in indoor sports from 27.6% to 30.8% (6). It will be interesting to see whether this trend continues when the next set of data becomes available.

In relative terms, North Wales has significantly better provision than the rest of Wales with unmet demand at an approximate average of 26%. This said, it is Ceredigion rather than any of the North Wales authorities that has the lowest level of unmet demand (11.8%). In most South East Wales authorities, unmet demand is

above the Wales average, with the exception of Monmouthshire (36.0%), whilst South West Wales has the two authorities with the highest level of unmet demand in Swansea (51.8%) and Neath Port Talbot (50.4%).

Table 1	
Unmet Demand for Sports Halls	(%)
Swansea	51.8
Neath Port Talbot	50.4
Bridgend	46.3
Rhondda Cynon Taff	46.1
Blaenau Gwent	46.0
Caerphilly	46.0
Cardiff	46.0
Merthyr Tydfil	46.0
Newport	46.0
Torfaen	46.0
Vale of Glamorgan	46.0
Carmarthenshire	44.7
Powys	43.6
Pembrokeshire	41.0
Monmouthshire	36.0
Wrexham	30.8
Conwy	28.6
Flintshire	27.5
Gwynedd	23.3
Isle of Anglesey	22.1
Denbighshire	21.3
Ceredigion	11.8

The main aim of these results should be to highlight those areas where the need for additional sports halls is greatest and to assist local authorities in choosing between the competing priorities of sports halls against other facility types. Besides building new sports halls, some unmet demand may be satisfied by increasing opening hours in the peak period (weekday evenings and weekends) and, where appropriate, opening up good quality facilities in the education sector to community use. However, in practical terms, pockets of unmet demand will always remain in scattered communities where a new sports hall would not be sustainable.

Sports halls at educational establishments having no public use were not included in the run. In any case it is doubtful whether many of these halls would reach the three badminton court size standard. However, the chance to improve school sports facilities over the next few years as a result of the New Opportunities Fund provides the opportunity to improve the standard of

school facilities and, through community use agreements, to fill some of the gaps in sports hall provision. In recent years many local authorities, supported by SPORTLOT funding, have invested in multi-use games areas; these have helped to supplement sports hall provision, especially when sited adjacent to a sports centre thereby enabling some indoor activities such as five-a-side football to be transferred outside.

SWIMMING POOLS

The results show an unmet demand for swimming of 17% across Wales (Table 2). This unmet demand is equivalent to just under eleven 25m pools. However, the results for many individual local authorities show either relatively low levels of, or widely dispersed, unmet demand which would not in itself justify new swimming provision.



Carmarthenshire (30.8%) and Rhondda Cynon Taff (17.3%) do have a sufficiently high level of unmet demand in visits per week to warrant the consideration of a new pool. However, the distribution of this unmet demand would need to be carefully examined to assess whether there is a significant pocket of unmet demand which could sustain a new facility. The Isle of

Anglesey (35.0%), Gwynedd (29.7%) and Ceredigion (27.2%) have significantly higher levels of unmet demand than the Wales average, although as these are less populous authorities the level of unmet demand in visits per week may not be sufficient to justify a new 25 metre pool. Further examination of the distribution of unmet demand in these authorities may identify areas where a smaller pool might be sustainable.

Table 2	
Unmet Demand for Swimming	(%)
Isle of Anglesey	35.0
Carmarthenshire	30.8
Gwynedd	29.7
Ceredigion	27.2
Pembrokeshire	22.1
Powys	21.3
Monmouthshire	19.7
Flintshire	18.4
Conwy	17.9
Rhondda Cynon Taff	17.3
Neath Port Talbot	16.9
Caerphilly	16.2
Merthyr Tydfil	15.8
Blaenau Gwent	15.5
Vale of Glamorgan	14.2
Wrexham	14.2
Newport	14.0
Denbighshire	13.6
Swansea	13.4
Torfaen	13.3
Bridgend	12.4
Cardiff	6.1

It should be noted that the model is only concerned with facilities for community use. It is therefore possible that swimming pools specifically for training or competition could be required in addition to existing and planned community pools. The location of such facilities would need to be determined in consultation with the governing body.

GOLF COURSES

The Council last published advice on golf course provision in 1999 (7). Wales currently has a total of 202 golf courses. Of these, 20 are par three courses and have been excluded from the Planning Model run, resulting in the Planning Model run being based on a higher quality of provision. The 182 full size courses are spread

across 166 sites of which 50 are in North Wales, 40 in South West Wales and 76 in the South East. At 33 (20%) of these sites, facilities are available on a ‘pay and play’ basis.



The level of unmet demand for golf is 9.7% (Table 3), representing 4,784 visits per week and being the equivalent of 9.6 units (a unit being 18 holes) on a ‘pay and play’ basis or 14.7 units if made up solely by the provision of ‘members’ clubs. The level of unmet demand for golf has declined in recent years with the change in the model from fixed catchment areas to travel times flattening unmet demand in South

Table 3	
Unmet Demand for Golf	(%)
Blaenau Gwent	14.4
Caerphilly	14.4
Merthyr Tydfil	14.4
Torfaen	14.4
Cardiff	14.3
Rhondda Cynon Taff	14.3
Vale of Glamorgan	14.3
Bridgend	13.9
Neath Port Talbot	13.8
Swansea	13.7
Carmarthenshire	13.4
Newport	12.6
Powys	9.4
Monmouthshire	4.2
Pembrokeshire	3.4
Ceredigion	2.1
Isle of Anglesey	0.5
Gwynedd	0.3
Wrexham	0.2
Conwy	0.0
Denbighshire	0.0
Flintshire	0.0

East Wales in particular. Within South East Wales there are a large number of courses easily accessible via the road network within the travel time of 25 minutes.

Disregarding what may be very small pockets of unmet demand in certain local authorities, the priority areas for new courses, based on pay and play holes, would appear to be: Cardiff (27 holes), Rhondda Cynon Taff (18-27 holes), Swansea (18 holes), Caerphilly (9-18 holes), Carmarthenshire (9-18 holes), Vale of Glamorgan (9 holes), Neath Port Talbot (9 holes), Bridgend (9 holes), Newport (9 holes), and Torfaen (9 holes).

In some of these cases, a single 18 hole course might provide a more economic solution where the need for nine hole courses is identified in adjacent authorities, for example Newport and Torfaen. In Cardiff, it is possible that a lack of available land will mean that unmet demand can only be met by locating the new courses recommended for Cardiff in neighbouring authorities.

Developments already in the pipeline which need to be taken into account are the extension of Llantrisant & Pontyclun from 12 to 18 holes, an additional 18 holes at Cottrell Park in the Vale of Glamorgan and active plans for an 18 hole course in the West of Newport. Meanwhile, anecdotal evidence suggests that some courses in West Wales, where many new courses have been opened in the past 10 years, are finding it difficult competing with each other to attract golfers. Conversely, the South and South East of Wales are where the majority of waiting lists for golf club membership exist. These factors also need to be considered when assessing the need for future new provision.

It is worth noting that for the first time in over 10 years of adult sports participation surveys conducted by SCW, golf participation declined from 4.6% in 1997/98 to 3.7% in 1998/99 (6). It is yet to be seen whether the data from the 2000/01 survey will show a continued fall in golf participation. Even if this is the case, the ‘Ryder Cup effect’ is expected to produce a renewed and increased interest in golf over the next decade which could trigger a further increase in both participation rates and unmet demand as a result, particularly of the pay and play type. Within the next year the Council intends to conduct a survey of golf clubs and will re-run the Planning Model for golf.

SQUASH COURTS

This is the first time that the model has been run for squash in Wales since advice was last published by the Council in 1993 (8). The level of unmet demand for Wales currently stands at 12.3% (Table 4). Most local authorities fall within a range from 9% to 16%, the exceptions being Conwy (2.6%), the Isle of Anglesey (4.3%) and Pembrokeshire (5.8%) which have particularly low levels of unmet demand.

Table 4	
Unmet Demand for Squash	(%)
Wrexham	15.8
Blaenau Gwent	15.1
Merthyr Tydfil	14.8
Caerphilly	14.4
Monmouthshire	14.2
Torfaen	14.2
Powys	14.0
Rhondda Cynon Taff	14.0
Newport	13.9
Cardiff	13.8
Vale of Glamorgan	13.4
Flintshire	12.8
Bridgend	12.3
Carmarthenshire	12.0
Swansea	12.0
Neath Port Talbot	11.4
Gwynedd	10.3
Ceredigion	9.8
Denbighshire	9.3
Pembrokeshire	5.8
Isle of Anglesey	4.3
Conwy	2.6

It should be noted that because squash courts are usually found in units of two, three or four they do not necessarily cater for demand in the most efficient way. Much of the unmet demand therefore consists of small pockets which the provision of single courts would potentially alleviate, although it is generally unrealistic to provide courts in single units.

There has in fact been a net loss of 36 squash courts across Wales in the last nine years. Nearly all new courts have been public sector provision, usually as part of a new sports centre development, whilst closures have been concentrated in the commercial sector. In addition, Sports Council for Wales surveys have found that, because of the lack of demand, around a third of

existing courts are used for other activities either on an occasional basis or as part of a longer term strategy. Adult participation rates for squash, which fell in the 1980’s, have continued to decline from 2.4% in 1991/92 to 1.2% in 1998/99.

Whilst there is no strong case for new squash provision, it might be sensible to consider including squash courts in any planned new leisure centres where there is perceived to be a local demand for squash facilities.

INDOOR BOWLING RINKS

Since the last model run for bowls in 1997, the percentage demand rate used has been increased to a more realistic level. In the past four years, one centre has closed and no new facilities have opened. Wales currently has a total of 147 rinks at 26 centres. The model shows unmet demand for indoor bowls at 61.8% (Table 5), equivalent to the need for 230 additional rinks.

Table 5	
Unmet Demand for Indoor Bowling	(%)
Isle of Anglesey	100.0
Wrexham	100.0
Gwynedd	92.1
Ceredigion	91.7
Flintshire	89.1
Conwy	84.7
Monmouthshire	71.8
Denbighshire	70.2
Torfaen	57.3
Caerphilly	54.9
Cardiff	54.9
Merthyr Tydfil	54.9
Newport	54.9
Rhondda Cynon Taff	54.9
Vale of Glamorgan	54.6
Blaenau Gwent	54.1
Carmarthenshire	53.3
Bridgend	49.1
Swansea	49.0
Neath Port Talbot	48.5
Pembrokeshire	47.2
Powys	31.1

However, 76 of these additional rinks are in North Wales where less flat green bowls is played because of the popularity of crown green bowls. This distinction cannot be factored into the model, but needs to be taken into

account when interpreting the results. The North Wales Authorities with the highest levels of unmet demand are Wrexham and Isle of Anglesey. In the South, the Authorities with the highest levels of unmet demand are Ceredigion and Monmouthshire.

It must be emphasised that, unlike an activity such as squash which is dependent upon purpose-built facilities, bowls can be played outdoors, and indoors on roll down mats and greens. The figure for additional indoor rinks required therefore represents an ideal situation which could be viewed as a long term aim.

ATHLETICS TRACKS

The model identified unmet demand for athletics in Wales as 24% (Table 6), equivalent to 4.5 new synthetic tracks. However, this unmet demand is generally made up by small pockets spread widely across many authorities.

Table 6	
Unmet Demand for Athletics	(%)
Ceredigion	100.0
Pembrokeshire	99.3
Blaenau Gwent	80.1
Isle of Anglesey	50.4
Gwynedd	50.0
Monmouthshire	43.6
Powys	42.6
Carmarthenshire	32.2
Denbighshire	27.3
Merthyr Tydfil	25.0
Caerphilly	23.8
Rhondda Cynon Taff	15.9
Swansea	12.6
Torfaen	11.7
Neath Port Talbot	10.4
Bridgend	8.4
Vale of Glamorgan	7.7
Cardiff	7.6
Newport	7.6
Conwy	5.9
Wrexham	1.3
Flintshire	0.0

The North and South East of Wales are relatively well provided for with insufficient unmet demand to justify new tracks, although there may still be a demand for specialist facilities in these areas. One possible exception

is Blaenau Gwent with a higher level of unmet demand (80.1%) which, although not sufficient to justify a full size facility, may merit the consideration of a smaller scale alternative. In South West Wales, there are high levels of unmet demand in Ceredigion (100%) and Pembrokeshire (99.3%), sufficient to indicate the need for a new facility. Again, further analysis of this unmet demand could help to determine the optimum location for any such new facility.

Whilst the National Indoor Athletics Centre was included in the run, the model cannot take account of indoor facilities short of a full size track. Therefore, regional indoor facilities together with smaller scale outdoor training facilities will need to be considered separately.

ARTIFICIAL TURF PITCHES

A total of 79 artificial turf pitches (ATPs) were included in the model run with half-size pitches being excluded. Whilst pitches are used for hockey, football and occasionally other activities, the primary use of full size ATPs is considered to be for hockey.

Table 7	
Unmet Demand for Artificial Turf Pitches	(%)
Ceredigion	52.7
Powys	41.0
Carmarthenshire	12.7
Pembrokeshire	11.3
Gwynedd	8.6
Denbighshire	6.9
Isle of Anglesey	1.6
Conwy	0.5
Wrexham	0.5
Swansea	0.1
Blaenau Gwent	0.0
Bridgend	0.0
Caerphilly	0.0
Cardiff	0.0
Flintshire	0.0
Merthyr Tydfil	0.0
Monmouthshire	0.0
Neath Port Talbot	0.0
Newport	0.0
Rhondda Cynon Taff	0.0
Torfaen	0.0
Vale of Glamorgan	0.0

Consequently the demand rates used were based on participation rates for hockey rather than any other sports.



The model results show an unmet demand across Wales of only 4.7% (Table 7). Only Ceredigion and Powys showed levels of unmet demand above 15%. Given the geographical size and largely rural nature of these two authorities, it is likely that this unmet demand is too scattered to justify an additional facility.

CONCLUDING REMARKS

As can be seen from the figures in Table 8, enormous advances have been made in facility provision in Wales over the last thirty years. Much of this development in provision has been undertaken by local authorities which, considering the financial restrictions on local government at various times during this period, is a tribute to their commitment to improve the community sports infrastructure in Wales.

The results of the latest Facilities Planning Model runs show that the majority of local authorities are currently well provided for in terms of most types of facility.

Wales has a relatively high level of sports facility provision in comparison with other parts of the UK. However, there is a shortfall in terms of sports halls which needs to be addressed, together with some gaps in provision of some other facility types.

Table 8	
Facility Provision in Wales, 1972 and 2002.	
1972	2002
11 Sports Halls	175 Sports Halls
29 Swimming Pools	140 Swimming Pools
104 Golf Courses	202 Golf Courses
86 Squash Courts	389 Squash Courts
	17 Synthetic Athletics Tracks
	26 Indoor Bowls Centres
	10 Indoor Tennis Centres
	79 Artificial Turf Pitches

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ANNEX 1

The Facilities Planning Model is a mathematical model which compares the supply of sports facilities with the demand from the resident population; it cannot assess demand from tourists. Demand includes both current participation levels and latent demand - when people want to participate in a sport but are prevented from doing so by, for example, lack of appropriate facilities. Information on the percentage and frequency of sports participation is applied to data on the numbers, age and sex of the local population. This produces an assessment of the demand for facilities. Information on the number, size, location and opening times of local facilities is assessed in conjunction with travel times to produce a capacity total. The model then compares the two totals for supply and demand in identical units of measurement involving ‘visits per week in the normal peak period’, which are specified for each activity. From this calculation, an estimate of unmet demand - the percentage of demand which cannot be met at existing facilities - is provided.

The model is sensitive to local variations in demography and geography and to situations where catchments overlap. It can be used to highlight shortages and over provision of facilities in any one area. The results provide an overview of the national situation in Wales as well as at local authority level. Additionally, the model is capable of calculating unmet demand or excess capacity in sports facilities for each one kilometre square in Wales.

The Facilities Planning Model can be used on a local basis, for example to assess the impact of closing an existing facility or to determine the most appropriate location for a proposed new facility. In the current situation, when refurbishment or replacement is being considered for facilities built in the 1970’s, its use could be particularly apposite. Organisations wishing to use the model should contact the Sports Council for Wales for an initial discussion on its suitability for the proposed application. If it is decided to proceed, a charge is made to cover the costs of the analysis.