September 19th, 2016

Notice Of Meeting

You are invited to attend the Active and Healthy Communities Committee meeting to be held on **Monday, 19th September 2016** at **6:00 pm** in **Commedagh Room, Downshire Civic Centre, Downpatrick.**

Chair: **Cllr M Carr**

Vice: **Cllr L Kimmins**

Members: **Cllr P Brown Cllr S Burns**

Cllr P Byrne Cllr S Doran

Cllr G Fitzpatrick Cllr V Harte

Cllr H Harvey Cllr D Hyland

Cllr K Loughran Cllr B Ó'Muirí

Cllr D Taylor Cllr J Trainor

Cllr W Walker

Agenda

9 Indoor Leisure Business Plan Update

10 Newry Leisure Centre Phase 2 Operating Model

11 Play Strategy Update

12 Sports Facilities Strategy Update with DEA Update

13 Sports Facilities Strategy with Financial Provision

Invitees

Cllr Terry Andrews	terry.andrews@downdc.gov.uk
Cllr Naomi Bailie	naomi.bailie@nmandd.org
Cllr Patrick Brown	patrick.brown@nmandd.org
Cllr Robert Burgess	robert.burgess@downdc.gov.uk
Cllr Stephen Burns	stephen.burns@downdc.gov.uk
Ms Sonya Burns	sonya.burns@newryandmourne.gov.uk
Cllr Pete Byrne	pete.byrne@nmandd.org
Cllr Michael Carr	michael.carr@newryandmourne.gov.uk
Mrs Dorinnia Carville	dorinnia.carville@nmandd.org
Cllr charlie casey	charlie.casey@newryandmourne.gov.uk
Cllr William Clarke	william.clarke@downdc.gov.uk
Cllr Patrick Clarke	patrick.clarke@downdc.gov.uk
Cllr Garth Craig	garth.craig@downdc.gov.uk
Cllr Dermot Curran	dermot.curran@downdc.gov.uk
Cllr Laura Devlin	laura.devlin@downdc.gov.uk
Mr Eoin Devlin	eoin.devlin@newryandmourne.gov.uk
Ms Louise Dillon	louise.dillon@newryandmourne.gov.uk
Cllr Sean Doran	sean.doran@newryandmourne.gov.uk
Cllr Sinead Ennis	sinead.ennis@nmandd.org
Cllr Cadogan Enright	cadogan.enright@downdc.gov.uk
Sandra Farrell	sandra.farrell@newryandmourne.gov.uk
Cllr Gillian Fitzpatrick	gillian.fitzpatrick@newryandmourne.gov.uk
Mr Patrick Green	patrick.green@downdc.gov.uk
Cllr Glyn Hanna	glyn.hanna@nmandd.org
Mr Liam Hannaway	liam.hannaway@nmandd.org
Catherine Hanvey	catherine.hanvey@nmandd.org
Cllr Valerie Harte	valerie.harte@newryandmourne.gov.uk
Cllr Harry Harvey	harry.harvey@newryandmourne.gov.uk
Cllr Terry Hearty	terry.hearty@newryandmourne.gov.uk
Cllr David Hyland	david.hyland@newryandmourne.gov.uk
Cllr Liz Kimmins	liz.kimmins@nmandd.org
Cllr Mickey Larkin	micky.larkin@nmandd.org
Mr Michael Lipsett	michael.lipsett@downdc.gov.uk
Cllr Kate Loughran	kate.loughran@newryandmourne.gov.uk
Cllr Jill Macauley	jill.macauley@nmandd.org
Cllr Kevin Mc Ateer	kevin.mcateer@nmandd.org
Colette McAteer	collette.mcateer@newryandmourne.gov.uk
Cllr Declan McAteer	declan.mcateer@newryandmourne.gov.uk
Eileen McParland	eileen.mcparland@newryandmourne.gov.uk
Mr Roland Moore	roland.moore@newryandmourne.gov.uk
Cllr Roisin Mulgrew	roisin.mulgrew@nmandd.org

Cllr Mark Murnin	mark.murnin@nmandd.org
Mrs Aisling Murray	aisling.murray@newryandmourne.gov.uk
Cllr Barra O Muiri	barra.omuiri@nmandd.org
Cllr Pol O'Gribin	pol.ogribin@nmandd.org
Mr Canice O'Rourke	canice.orourke@downdc.gov.uk
Ms Patricia Oakes	patricia.oakes@downdc.gov.uk
Cllr Brian Quinn	brian.quinn@newryandmourne.gov.uk
Cllr Henry Reilly	henry.reilly@newryandmourne.gov.uk
Cllr Michael Ruane	michael.ruane@newryandmourne.gov.uk
Cllr Gareth Sharvin	gareth.sharvin@downdc.gov.uk
Cllr Gary Stokes	gary.stokes@nmandd.org
Sarah Taggart	sarah-louise.taggart@downdc.gov.uk
Cllr David Taylor	david.taylor@newryandmourne.gov.uk
Caroline Taylor	Caroline.Taylor@downdc.gov.uk
Cllr Jarlath Tinnelly	jarlath.tinnelly@nmandd.org
Cllr John Trainor	john.trainor@nmandd.org
Cllr William Walker	william.walker@nmandd.org
Mrs Marie Ward	marie.ward@downdc.gov.uk

ACTION SHEET- ACTIVE & HEALTHY COMMUNITIES COMMITTEE MEETING – MONDAY 15 August 2016

AGENDA ITEM	SUBJECT	DECISION	OFFICER Responsible	FOR COMPLETION BY DIRECTOR – including actions taken/date completed or progress to date if not yet completed
AHC/98/2016	Notice of Motion received from Cllr P Brown	**It was agreed that this Council write to DAERA Minister McIlveen to review the BSL Legislation taking into account preventative measures being put in place and more transparency around behavioural testing for dogs.**	Eoin Devlin	**Letter sent to the Minister**
AHC/99/2016	DEA Fora Update	**It was agreed that the following be accepted:** ▪ **The recommendations outlined in the Action Sheets from the DEA forum meetings held in May and June 2016.** ▪ **To note the report of the DEA public meetings held in June 2016.** ▪ **The Statutory Partner Service Level Agreement.** ▪ **To adopt the amended DEA Terms of Reference.** ▪ **The DEA Operating Framework.**	Janine Hillen	**Actioned**
AHC/102/2016	Youth Mural at Three Ways Community Centre	**It was unanimously agreed that approval be given to the extension of Youth Arts Programme including a mural on the external wall, in Three Ways Community Centre (following discussion with Council Community Development Officer).**	Janine Hillen	**Discussions with Three Ways representatives ongoing**
AHC/104/2016	Sports Facility Strategy Update	**It was agreed that the Draft Facility Strategy would be sent to the 7 DEAs for consideration and comment, with a further report to AHC Committee as soon as possible thereafter.**	Roland Moore	**In progress**

AGENDA ITEM	SUBJECT	DECISION	OFFICER Responsible	FOR COMPLETION BY DIRECTOR – including actions taken/date completed or progress to date if not yet completed
AHC/105/2016	Down Your Street/Civic Pride Programme	**It was agreed that the Down Your Street/Civic Pride Programme would be rolled out across the District.**	Eoin Devlin	**In progress**
AHC/107/2016	Local Air Quality Management	**It was agreed that 50% of the cost be allocated to purchase two replacement air quality monitoring analysers for use by the Health and Wellbeing Department in the Canal Street, Newry Air Quality Monitoring Station.**	Eoin Devlin	**In progress**

Report to:	Active and Healthy Communities Committee
Date of Meeting:	19 September 2016
Subject:	Newry Street Unite Community Centre Project
Reporting Officer (Including Job Title):	Janine Hillen, Assistant Director of Community Engagement
Contact Officer (Including Job Title):	Julie McCann/Carmel McKenna

Decisions required:

Members are asked to note the contents of the report.

1.0	**Purpose and Background:**
1.1	Newry Street Unite have secured funding of £350,000 from The Big Lottery Fund, Space and Place programme to build a new community facility and upgrade the councils existing play park at Hillside Drive, Kilkeel. The project will be developed on land leased by the Council from the Housing Executive and also an adjoining piece of land owned by the Housing Executive outright. Newry Street Unite Community Association wrote to the Council seeking approval to sub lease the site for the community centre development and a play area. A request was also made asking the council to lease the other piece of ground from the Housing Executive and sub-lease it to them also.
2.0	**Key issues:**
2.1	<u>TIMEFRAME FOR PROJECT.</u> At a recent meeting between the Council, Space and Place and the Community Association the following timeline was agreed: • ITT for design team to be developed and advertised (26/09/16) • Return of tender documentation (week commencing 24/10/16) • Appointment of design team (14/11/16) • Submission of planning permission (week commencing 30/01/17) • Approval of planning permission (27/03/17) (10 weeks) • ITT for contractor to be developed (feb 2017) PROPOSED START DATE APRIL 2017 WITH A TEN MONTH BUILD PERIOD The project must be completed by the 31st March 2018. <u>LEASE NEGOCIATIONS.</u> The N.I Housing Executive has written back to the council with a number of

	revised proposals which will be tabled at **Septembers SPR for consideration**. These include: 1) A payment of £14,500 paid for a 25 year lease on the whole site. 2) A business case is made for a community asset transfer which will allow the site to be leased at a nil premium. At a meeting on 24th August 2016 between the Council and Housing Executive, it was agreed that given the time constraints on this project that the Housing Executive legal department would prepare two leases: 1) based on the £14,500 valuation 2) based on the asset transfer. <u>COMMUNITY ASSOCIATOIN TARGETS</u> The Newry Street Unite Community Association is currently appointing a solicitor to act on their behalf when dealing with the legal issues in relation to lease agreements etc. The Community Association and Council are working with Groundwork's NI to draw up an ITT document for the procurement of a design team for the project. The Newry Street Community Association is preparing to submit a Financial Assistance application to Council for £70,000 when the call is opened (estimated Jan 2017).
3.0	**Recommendations:**
3.1	Members are asked to note the contents of the report.
4.0	**Resource implications**
4.1	Legal costs in relation to leases/sub leases etc. and also maintenance /insurance costs of upgraded play park.
5.0	**Equality and good relations implications:**
5.1	Not Applicable
6.0	**Appendices**
	Not Applicable

Report to:	Active and Healthy Communities Committee
Subject:	DEA Fora Update
Date:	19 September 2016
Reporting Officer:	Janine Hillen, Assistant Director: Community Engagement
Contact Officer:	Suzanne Rice, Crotlieve DEA Coordinator

Decisions Required

Members are asked to note the contents of the report, and consider and agree to:

- Approve recommendations outlined in attached action sheets from the DEA Forum meetings held in July and August 2016.

1.0 Purpose & Background

Council through the Good Relations Action Plan, which is part funded by The Executive Office, has secured a budget of £7,000 for each DEA, specifically to fund Good Relations activity. Any supported programmes and projects must meet The Executives requirements under their 4 key themes; Children and Young People, Our Shared Community, Our Safe Community and Our Cultural Expression. The Executive Office has also agreed that the DEA public meetings can be funded by this financial resource.

During the summer months, DEA Coordinators assisted in the roll out of Free Playboard Play schemes. The DEA Coordinators worked with local community representatives to agree venues and dates and acted as Councils point of contact for the schemes. The free 4 x 2 hour play schemes took place in a variety of locations across the District and were well received by participants and parents.

DEA Forum members have, through the course of private meetings been consulted on the roll out of Councils Sports Facilities Strategy and Master plans.

Dates of next meetings of DEA Forums are outlined below:

DEA	Private
Slieve Gullion	5th October 2016
Newry	27th October 2016
Crotlieve	15th November 2016
The Mournes	20th October 2016
Slieve Croob	TBC
Downpatrick	TBC

	Rowallene | TBC Times and venues to be confirmed by DEA Coordinators. **Upcoming October 2016** DEA Forum Elected Representatives and Independent Members will participate in a workshop to examine/finalise the draft action plans for each DEA, taking account of the Community Plan outcomes and applying an Outcome Based Accountability approach to decision making.
2.0	**Recommendation** Members are asked to note the contents of the report, and consider and agree to: - Approve recommendations outlined in attached action sheets from the DEA Forum meetings held in July and August 2016.
3.0	**Resource Implications** Not Applicable
4.0	**Appendices** Appendix A – DEA Fora action sheets.

DEA/M/1

ACTION SHEET – The Mournes District Electoral Area Meeting – 24 8 16

ITEM	SUBJECT	DECISION	FOR COMPLETION – Including actions taken/date completed or progress to date if not yet completed	Actions Taken
DEA/M/61/2016	DEA Action Sheet	DEA/M/52/2016 - P Houston asked why Kitty's Rd had a village plan if it was in an urban area. C McCarney stated that the Kitty's Rd area was half urban and half rural.	C McCarney to furnish Ms Houston with a map of the area.	
DEA/M/64/2016	Report of Officers Meeting with representatives of Kilkeel and Mourne Sea Cadets held on 27 June 2016	Cllr Reilly asked for clarification regarding the 99 year lease. On the proposal of Cllr Reilly, seconded by Cllr Hanna it was agreed that the Report of Officers Meeting with Representatives of Kilkeel and Mourne Sea Cadets held on 27 June 2016 be approved.	C Loughran to forward to C McKenna for clarification.	
DEA/M/65/2016	Discussion on proposed car park extension at Carrigenagh Road	On the proposal of Cllr Hanna, seconded by Cllr Quinn it was agreed that the proposed car park extension at Carrigenagh Road be carried out and a follow up meeting with PSNI/Transport NI be convened if the parking issues continue at this location.	C Haughey to action.	

DEA/M/1

DEA/M/66/2016	Environmental Health Issues	A site meeting to be set up in the Annalong Area with Mournes DEA Cllrs, representatives from NI Water, relevant Council Officials and Annalong Community Association to discuss sewage in the Annalong Area.	C Loughran to action.	
DEA/M/67/2016	Discussion on Provision of Outdoor Sports and Community Facilities for Castlewellan Road, Newcastle	It was agreed that a meeting be set up between the local land owners/Apex Housing Association, local community groups and NI Rivers Agency to discuss this.	C Loughran to action.	
DEA/M/68/2016	Discussion Newcastle Harbour Conservation Plan	This to be discussed at next DEA Meeting. C Loughran to circulate Newcastle Conservation Plan to DEA Forum members.	C Loughran to action.	
DEA/M/69/2016	Update on Annalong Harbour and Stormgate	The insurers have offered the sum of £40,000 for the repair of the Stormgate, this is insufficient amount to repair the stormgate. Cllrs queried how the initial insurance of the stormgate was determined.	C Loughran to contact M Boyle and report back.	
DEA/M/70/2016	Newcastle Bowling Pavilion	The refurbhisment works at Newcastle Bowling Pavilion will commence on 8 September 2016 at a cost of £12,000. The provision of a new bowling pavilion will be placed	M Lipsett to place in 2017/18 Rates Estimates.	

DEA/M/1

		in the rates estimates for 2017/18 financial year. G McDonald asked that the provision of toilet facilities in the Newcastle area also to be looked at. This to be referred to the RTS Department for consideration. P Houston asked that Translink are contacted regarding the lack of toilet facilities at the bus station in Kilkeel	C Loughran to action. C Loughran to action.	
DEA/M/73/2016	DEA Nomination from SAND	On the proposal of Cllr Clarke and seconded by G McDonald it was agreed that Mr Andy Hall would be the SAND Representative for the Mournes DEA.	C Loughran to action.	
DEA/M/75/2016	Community Visioning Summary Document	Access to services via Community Transport to be discussed at next DEA Meeting.	C Loughran to action.	
DEA/M/78/2016	Update on Nominations	C Loughran advised that there are now two nominations remaining. One from the environmental sector ie Mourne Heritage Trust or consult with Danielle Begley, Biodiversity Officer and a youth representative are required at this stage.	C Loughran to action.	
DEA/M/81/2016	Safety	Cllr Doran referred to the lack of car parking at the BloodyBridge and raised concerns about the safety of this area. It was suggested that a Park and Ride Service should be provided and Transport NI should be written to expressing	C Loughran to write to Transport NI.	

		these concerns.		
DEA/M/84/2016	Any Other Business	P Houston enquired if it were possible for her to obtain a detailed breakdown of the spend under each Thematic Group for the Mournes DEA.	C Loughran stated that she would contact the Finance Department and report back.	C Loughran has contacted the Finance Department. The Audited Accounts for 2015/16 are not yet available.

ACTION SHEET- Downpatrick District Electoral Area Meeting – 15th July 2016

ITEM	SUBJECT	DECISION	FOR COMPLETION – including actions taken/date completed or progress to date if not yet completed
DEA/2/2016	Downpatrick Master Plan and Draft Action Plan	Clarification to be sought from Chief Planning Officer on the position of the Saul Road Development.	Ellen Brennan sought clarification on 15.07.16 – Planning representatives confirmed that the item had been 'called in' by Minister for Department for Infrastructure before meeting. The matter is now being dealt with by his Department.
		A paper on Traffic Congestion and removal of the Blast Wall to be prepared for submission to the Planning and Spatial Development thematic group.	David Patterson to action.
		Jonathan McGilly to merge Draft Action Plan and Cllr Enright's spreadsheet into one document and to attend next meeting to move matter forward.	Jonathan McGilly to action.
		Members to review information from meeting and identify priorities to David Patterson prior to next meeting. David to forward results to Jonathan McGilly. Jonathan to include results on Draft Action Plan.	Members to action. David to action. Jonathan to action.
		Structure and Membership of 4 thematic groups to be circulated to members.	Circulated by Email to all members and deputies on Tuesday 19th July 2016.
	Date of next meeting	Next meeting to be scheduled for early September	Chair and DEA Coordinator to agree date of next meeting.

NT/MIN/1

ACTION SHEET- Newry District Electoral Area Meeting – 25/8/16

ITEM	SUBJECT	DECISION	FOR COMPLETION – including actions taken/date completed or progress to date if not yet completed
DEA/NT/59/2016	**Minutes and Action Sheet of Newry DEA Forum Meeting held on 26 May 2016**	Cllrs asked that S Trainor, EHO be contacted regarding the ongoing noise concerns at McAteer's Recycling Ltd.	K Morrow to action.
DEA/NT/60/2016	**Minutes of Newry DEA Forum Meeting held on 2 June 2016**	Cllrs asked that updates on Bull's Hill be provided.	K Morrow to action.
DEA/NT/63/2016	**Letter from South Ulster Housing Association (SUHA)**	Read: Letter from SUHA dated 30 June 2016 regarding proposed Social Housing in Newry, circulated for information. Councillors enquired of the number of dwelling propsed, the exact location and whether or not the local residents or community association had been consulted. Councillors requested an update in relation to development in Canal Street?	K Morrow to contact SUHA and report back.
DEA/NT/64/2016	**Transport Report**	K Morrow gave an update on this report and included additional items discussed. Various Roads issues.	K Morrow to update Cllrs/Transport NI/Housing Executive in relation to any progress on these matters.
DEA/NT/66/2016	**DEA Nomination from SAND**	On the proposal of Cllr Hyland and seconded by Cllr Casey, it was agreed that Ms Nicola McAlinden be accepted to the Newry DEA Forum as the SAND representative.	K Morrow to action.

NT/MIN/1

DEA/NT/69/2016	**Newry Felons – Water Supply from Loanda House Community Centre to tunnel**	On the proposal of Cllr Casey, seconded by Cllr Hyland it was agreed that the Council recommend that a supply from Loanda House Community Centre to the tunnel located on the ground leased by Newry Felons Association.	K Morrow to forward to C McKenna and D Rice for action.
DEA/NT/70/2016	**Newry Library**	Cllrs requested that a meeting be arranged to discuss potential support from Council to Newry Library	K Morrow to meet Marie Gavin, Libraries NI and prepare report.

Report to:	Active & Healthy Communities Committee
Date of Meeting:	19 September 2016
Subject:	Christmas Illuminations 2016 & 2017
Reporting Officer (Including Job Title):	Janine Hillen, Assistant Director Community Engagement
Contact Officer (Including Job Title):	Julie McCann Head of Service for Community Services, and Sonya Burns, Programmes Manager

Decisions required:

Committee to review report and agree to:

- **Provision of grant aid to communities through Financial Assistance call in September 2016 (£300 - £3,000 thresholds)**
- **Undertake consultation exercise through each DEA, with communities that council currently supply to consider a one-off payment to assist with the purchase of trees and/or illuminations from 2017 forward**
- **Cross-departmental review post-Christmas 2016, to inform arrangements for 2017 and report back to relevant Committees**

1.0	**Purpose and Background:**
1.1	Council is committed to helping communities celebrate Christmas. In 2015, this support was provided in a number of ways: • Provision of Christmas trees (26 locations) • Provision of illuminations (15 urban locations) • Official 'switch on' events (8 in total) • Grant aid through Financial Assistance (38 in total)
2.0	**Key issues:**
2.1	In 2015, the levels and type of support were primarily based on legacy arrangements and totalled expenditure in excess of £160k. A review of this provision is necessary going forward to ensure an equitable spread of resource and to take create opportunities to build the capacity of communities who wish to take ownership of their own celebration events. An options paper was presented to the Group Leaders Forum on 4th August and it was agreed that for the purposes of consistency Council should continue to support communities in line with legacy arrangements, whilst at the same time consult and develop proposals for a refined approach in 2017. In summary, AHC will provide grant aid, ERT will roll out official 'switch on' events and R&TS will provide and erect trees and/or illuminations.
3.0	**Recommendations:**

3.1	• Provision of grant aid to communities through Financial Assistance call in September 2016 (£300 - £3,000 thresholds) • Undertake consultation exercise through each DEA, with communities that council currently supply to consider a one-off payment to assist with the purchase of trees and/or illuminations from 2017 forward • Cross-departmental review post-Christmas 2016, to inform arrangements for 2017 and report back to relevant Committees
4.0	**Resource implications**
4.1	£30k grant aid provided through Financial Assistance call (included in rates estimates) Officers time. This may not be sufficient and additional financial resource may be required. A detailed report on applications received will be brought to Active and Healthy Communities Committee for further discussion/decision.
5.0	**Equality and good relations implications:**
5.1	A review of current provision has indicated that there is an imbalance in the number of trees provided in both legacy council areas. These recommendations seek to ensure that this can be addressed going forward. Grant aid is advertised, assessed and awarded in an equitable and robust manner.
6.0	**Appendices**
	Appendix I: None

Report to:	Active and Healthy Communities Committee
Date of Meeting:	19 September 2016
Subject:	Supporting Community Projects
Reporting Officer	Michael Lipsett – Director Active & Healthy Communities
Contact Officer	Roland Moore – Assistant Director Sport and Leisure Janine Hillen – Assistant Director Community Engagement

Decisions required:

Members consider Capital and Revenue Provision to support Community Associations with facility and/or programme development and to satisfy external funding body requirements for match funding (£550k to be considered as part of the rates estimates)

Members agree to ring-fence funding required to meet design costs associated with Drumalane Community Association build (Approx £29k in 16/17 financial year).

Officers investigate the introduction of a Community Support Loan Scheme and report back to Committee with an options paper.

1.0	**Purpose and Background:**
1.1	Community Associations who have been proactive in accessing funding from external providers such as the Rural Development Programme or DfC Neighbourhood Renewal for example are being asked to secure an element of match funding towards the delivery of their overall project. This has placed an additional strain on groups who are discouraged from showing any match funding element as 'support in kind'. Council act as the lead partner in the majority of these capital and revenue projects and as such are being approached for support. In order to fully capitalise on projects that can be delivered in our District, Council must find ways to provide the necessary resource required.
2.0	**Key issues:**
2.1	**Community Facilities Fund (Capital)** Northern Ireland Rural Development Programme (2014 - 2020) is just one of a number of funding bodies that can provide large scale funding for community capital projects. The Programme has the capacity to deliver up to approximately £1.8m in the schemes of Rural Basic Services and £3.1m in Village Renewal throughout the lifetime of the Programme. However, there is a match funding element of up to 25% for each successful application.

	Council may need to set aside a capital support budget to meet this funding requirement and fully assist local groups. (Total budget: £450k – Max £75k application) **Community Facilities Fund (Revenue)** Drumalane Community Association for example, has secured £280k for the provision of a much needed community centre from Department for Communities (DfC). As a funding requirement they have been asked to meet the design costs prior to the build, at an estimated cost of £25k - £30k (this is in addition to the project management role currently provided by Council). Through the Neighbourhood Renewal Partnership, Council is completing an application to DfC to recoup these costs. The outcome of this will not be known for several months and any delay could result in failure to deliver this project within the current financial year. Council may need to set aside a revenue support budget to meet this type of funding requirement and fully assist local groups. (Total budget: £100k – Max £15k application) **Community Support Loan Scheme** The demands on Council to project manage community based projects continues to grow. The provision of this support still has financial implications for Council who must subsequently procure external services (such as quantity surveyor, graphic designers etc). Going forward Council should investigate the opportunity of introducing a Community Loan Scheme (similar to legacy Council models). This would enable temporary grants to community organisations to complete projects, pending receipt of grant funding and to subsequently repay Council the loaned revenue. Report back to Committee to determine Scheme capacity (Oct 2016).
3.0	**Recommendations:**
3.1	Members consider Capital and Revenue Provision to support Community Associations with facility and/or programme development and to satisfy external funding body requirements for match funding (£550k to be considered as part of the rates estimates) Members agree to ring-fence funding required to meet design costs associated with Drumalane Community Association build (Approx £29k in 16/17 financial year). Officers investigate the introduction of a Community Support Loan Scheme and report back to Committee with an options paper.

4.0	**Resource implications:**
4.1	Implications for the Financial Assistance funding of £550,000. Provision of approx. £29,000 to cover design related costs for Drumalane (Application to be submitted to DfC to recover these costs)
5.0	**Equality and good relations implications:**
5.1	The Financial Assistance process would be assessed for Equality and Good Relations implications.
6.0	**Appendices**
	Not Applicable

Report to:	Active and Healthy Communities
Date of Meeting:	19th September 2016
Subject:	Indoor Leisure Business Plan Update
Reporting Officer (Including Job Title):	Roland Moore, Assistant Director Leisure and Sport
Contact Officer (Including Job Title):	Kieran Gordon, Head of Indoor Leisure

Decisions required:

Members are asked to note the contents of the report, and consider and agree to:

- **Adoption of specific Indoor Leisure Business Plan from 2016-2020**

1.0	**Purpose and Background:**
1.1	In June 2016, Officers were granted the approval to engage with a 3rd party to develop an Indoor Leisure Specific Business Plan for 2016-2020. The work involved industry research and engagement with the leisure management team which is predominately driven from the AHC Directorate Business Plan 2016/17, specifically its key responsibilities for: **Leisure and Recreation** • Provide and operate high quality leisure facilities • Develop policies and services with a common theme of increasing participation in leisure, recreation and sporting activities • Develop indoor leisure infrastructure The key drivers for this Business Plan and Service Review arise from the following relevant Corporate and Directorate objectives from the AHC Department Plan 2016/17, specifically: **Corporate Objectives** • Supported improved Health & Wellbeing outcomes • Transformed and modernised the Council, providing accessible as well as value for money services **Directorate Objectives** • Promote increased levels of activity • Develop targeted programmes to support improved health and wellbeing outcomes • Identify efficiencies and increase effectiveness in service delivery • Improve the accessibility of services, facilities and programmes
1.2	In order to develop a business plan, a service review was conducted that focused on the following specific areas that covered the facilities currently within Indoor Leisure: • Demographic analysis • Competitor analysis • Benchmarking of key income areas

	• Latent demand for fitness • Participation levels and facility occupancy levels • Income projections • Customer need • Systems and support • Investment opportunities
2.0	**Key issues:**
2.1	Refer to Appendix A for key projections and Appendix B for the Business Plan and Service Review. Key areas are summarised as follows: **<u>Participation levels</u>** • Within the last year, there has been approx. 1.3 million visits to Indoor Leisure facilities • Based on the latent demand for fitness, demographics and delivery of the key recommendations by end of year 4, there is potential to increase this to 1.9 million visits to Indoor Leisure facilities per annum **<u>Latent Demand for fitness</u>** • There are currently approx. 2,036 members across Indoor Leisure facilities • Based on each areas demographics, competitors and delivery of the key recommendations by end 2020/21, its estimated that collectively there is potential for an additional 3,584 members which could result in an additional £951,598 income by 2020/21 if optimum potential is achieved. **<u>Review of current income and projections</u>** • Within the current budget, it is estimated that it costs Council £3.14m per annum to operate its Indoor Leisure facilities (net cost) • Delivery of the key recommendations over the forthcoming 4 year period could result in a cost to Council of £2.53m Per annum, estimated as a £0.61m saving per annum by end of 2020/21 on the assumption that income and expenditure remain similar and not allowing for inflation.
3.0	**Recommendations:**
3.1	That Council progress the recommendations as set out in the report and specifically table 3 in Appendix A and engage assistance where necessary in order to achieve this plan by end of 2020/21 financial year, specifically: • ICT – immediate review, enhancement and implementation of modern infrastructure by end of 2016/17 to support Business Plan objectives and reporting • Marketing and Branding – immediate development and implementation of a strategy to include sub brand, transparent customer journey, staff training and recruitment of additional resource by end of 2016/17 • Pricing – review and simplification of structure with presentation of proposals for committee decision by end of 2016/17 • Programming and Resource – Develop clear linkages with other departments, specifically Sports Development, to begin to increase participation and programmes on offer with additional 2 Officers resource as identified, recruited by end of 2016/17 • Additional income opportunities – develop proposals for consideration for facility enhancements for use of low occupancy space and specifically Kilkeel Leisure Centre Fitness Suite Space by end of 2017/18

4.0	**Resource implications**
4.1	• ICT – engagement with IT Manager and cost enhancements should be from the revenue budget across the indoor leisure facilities and ICT • Marketing and Branding – involve engagement with a 3rd party, costs of which should be from the revenue budget across the indoor leisure facilities. 1 x leisure specific commercial officer, estimated at £30k per annum, costs of which should be derived from the potential savings as set out in section 2.1. • Pricing – Officer time to complete review • Programming and Resource – 2 x leisure specific sports activity staff, estimated at £30k per annum each, costs of which should be derived from the potential savings as set out in section 2.1. • Additional income opportunities– Officer time to complete review • Allowing for 3 posts identified to be derived from potential savings as set out in section 2.1, it is therefore estimated that Council can obtain a £0.61m saving per annum by end of 2020/21 (£2.53m per annum to operate) on the assumption that income and expenditure remain similar and not allowing for inflation.
5.0	**Equality and good relations implications:**
5.1	To be assessed for Equality and Good Relations implications.
6.0	**Appendices**
	Appendix A – Indoor Leisure Business Plan Key Summary Appendix B – Indoor Leisure Business Plan and Service Review

Appendix A - Summary of Key Tables from Business Plan and Service Review

Table 1 – Participation Projections for Indoor Leisure Facilities

	15/16	16/17	17/18	18/19	19/20	20/21
NLC (NSC/ NSP)	541,924	555,272	586,316	619,610	652,904	811,050
KLC	159,161	163,301	196,437	182,838	203,765	203,765
Bmote	42,076	42,076	43,076	43,076	43,076	44,368
DLC	167,668	188,015	192,515	209,862	360,000	432,000
NEW	389,883	418,395	418,395	418,395	418,395	430,947
Total	1,300,712	1,367,060	1,436,739	1,473,781	1,678,140	1,922,131

**15/16 figures represents actual customer throughout indoor leisure centres*
***16/17 – 20/21 are projected customer throughout figures to take into account NLC Phase 2 opening during the summer of 2017 and the new DLC opening during the 19/20 financial year*
****Newcastle figures include seasonal facilities such as the Rock Pool and Tropicana.*

Table 2 – Financial Projections for Indoor Leisure Facilities

	16/17	17/18	18/19	19/20	20/21
Income	£1.85m	£1.92m	£2m	£2.45m	£2.72m
Expenditure	£4.99m	£4.88m	£4.88m	£5.25m	£5.25m
Net Cost To Council	£3.14m	£2.96m	£2.88m	£2.80m	£2.53m

17/18 expenditure include approx. deduction of costs in merging of NLC Phase 1 and Newry Sports Centre pending NLC Phase 2 opening during the summer of 2017

19/20 expenditure includes approx. increase of costs for new DLC

Assumptions on income projections are detail in section 1.8 of the main Business Plan

Table 3 – Business Plan and Service Review Key Recommendations and Action

(as derived from Indoor Leisure Business Plan and Service Review Executive Summary 1.7)

Area	Action
ICT	• Immediate review needed of ICT and the use of modern infrastructure across Indoor Leisure. • Council should be aiming to enhance website offerings and also provide access to online joining, bookings, mobile apps • consistent reporting of income and usage data across the service needed
Marketing and Branding	Leisure Specific Marketing and Branding Strategy needed to achieve a consistent service proposition: • development of a specific indoor leisure Sub brand that includes a clear and transparent journey and offering for the customer • development of a clear and consistent sales process and culture to improve data capture and income conversion • alignment of indoor leisure facility services, procedures and governance

	• investment in gym equipment to modernise centres and offer continuity of services across sites with same equipment supplier allowing for customer integration across the sites and availability of programmes, health assessments and associated technology being identified as a key retention tool • Additional staffing support such as an officer dedicated to commercial income, branding and marketing across Indoor Leisure section.
Pricing	Review of Leisure Pricing Strategy proposed: • Simplification of membership pricing structure • consider opportunities for innovative pricing strategies • consider options regarding over 60's and less abled scheme (price, eligibility and access permissions)
Opportunities for Income Generation	Develop further and implement proposals for opportunities for income generation through facility development and enhancements: • Newcastle • consider Kilkeel Leisure Centre gym floor space to enhance potential income and potential capacity issues • Consider change of use for sports halls which may have positive impact on participation levels, reducing low occupancy levels and increasing income.
Programming	Consistency of activities needed along with general targeted programming and enhancement of sports development that will assist in increased participation and income levels: • swim lessons (to increase size of current programme) • Group exercise classes (ie. Follow Newry model) • review of coached activities in terms of in house provision versus outsource • consider and develop general targeted programmes that link with corporate objectives • need to provide additional staffing resource to develop activity programmes
Resource	• Appointment of key personnel to maintain direction and delivery of action plan, ie. Leisure Specific Commercial Services Officer.
Linkage and Collaboration	• Closer links with outdoor leisure • Closer links with sports development • Closer links with health and well-being related departments • Above 3 links should increase participation levels and increase targeted programmes
Reporting	• Need for improvements for future performance monitoring and benchmarking that will influence delivery of the business plan action plan.
Training	• Further training for staff would improve the level of information available to potential customers and the customer journey from initial contact to visiting the centres.

Comhairle Ceantair an Iúir, Mhúrn agus an Dúin

Newry, Mourne and Down District Council

Newry, Mourne and Down District Council

BUSINESS PLAN AND SERVICE REVIEW

13TH September 2016

MAX associates

CONTENTS

Abbreviations

BMOTE – Ballymote Sports and Wellbeing Centre
DLC –Downs Leisure Centre
KLC – Kilkeel Leisure Centre
NEW – Newcastle Leisure Centre
NLC – Newry Leisure Centre
NMDDC – Newry, Mourne and Down Council
NSC – Newry Sports Centre
SCSC – St Colmans Sport Complex
SENBS – Sport England National Benchmark Service
Sport NI – Sport Northern Ireland

Definitions

DEFINITIONS	
Peak Hours	Monday – Friday from 5 pm. All day Saturday and Sunday.
Off Peak Hours	6.30am – 5pm Monday to Friday.
Centre	Includes all leisure centres and sports centre owned and managed by Newry, Mourne and Down District Council.
Facility (ies)	The areas available within a centre such as sports hall, pool, tennis courts, changing rooms etc.
Leisure Activity	Activities people do to relax or enjoy themselves outside of work and other duties.
Physical Activity	Active living, recreational activity, sport, exercise, play and dance.
Sport	"All forms of physical activity which, through casual or organised participation, aim at expressing or improving physical fitness and mental well-being, forming social relationships or obtaining results in competitions at all levels." (Council of Europe, 2001).
Yield	The calculation to determine the actual income achieved per member per month.
Occupancy	The number of actual bookings against total hours available for bookings.

1. Executive Summary

1.1. Max Associates has been commissioned by Newry, Mourne and Down District Council (NMDDC) to complete a business plan and service review of the indoor leisure centres to assess their income performance against industry standards and to highlight future opportunities and support officers to deliver a four-year Business and Action Plan.

1.2. This report covers the first step of the process to achieving higher participation numbers, increase in revenue and enhancements for the service. The assessment highlights the strengths of the existing provision and outlines areas that could be improved. It also provides an indication of the income potential for the two new sites in Newry and Downpatrick.

1.3. The work involved site visits, data gathering, benchmarking, data analysis and engagement with the leisure management team which is predominately driven from the Active and Healthy Communities Directorate Business Plan 2016/17, specifically its key responsibilities for:

Leisure and Recreation

- Provide and operate high quality leisure facilities
- Develop policies and services with a common theme of increasing participation in leisure, recreation and sporting activities
- Develop indoor leisure infrastructure

The key drivers for this Business Plan and Service Review arise from the following relevant Corporate and Directorate objectives from the Active and Healthy Communities Directorate Business Plan 2016/17, specifically:

Corporate Objectives

- Supported improved Health & Wellbeing outcomes
- Transformed and modernised the Council, providing accessible as well as value for money services

Directorate Objectives

- Promote increased levels of activity
- Develop targeted programmes to support improved health and wellbeing outcomes
- Identify efficiencies and increase effectiveness in service delivery
- Improve the accessibility of services, facilities and programmes

1.4. Local Context Summary

1.4.1. The context of the council area in which the centres operates is important to understand prior to assessing the performance of the centres. The key findings are detailed below:

- The total population of the Newry, Mourne and Down Government District is 175,403 (June 2014) with the 40-64 age bracket being the most dominant.
- The District has an aging population with the 60+ age group expected to rise to 28.4% of the projected population by 2037.
- With regards to health and employment statistics the District generally preforms on par or slightly better than the Northern Ireland averages. However, it is one of the highest ranked areas of deprivation.
- Each of the centres show latent demand for fitness potential, with the opportunity for significant growth at Newry Leisure Centre (NLC) and Down Leisure Centre (DLC), with latent demand of 1,106 and 1,807 fitness members respectively.
- There is minimal competition for each of the centres in all activity areas, with the majority of competition coming from other local authority provision.
- It is recognised that there is a need to review/replace provision at the Newcastle Centre in the future.
- Demand modelling shows need for additional badminton courts, however this should be reviewed against an assessment of occupancy of the existing facilities as well as developing the opportunity for community use of school sports facilities.
- There will be a need for additional water space in the future and this should be considered as part of the Newcastle Centre future development.

1.5. Key findings on the Quality of Service Delivery

- Online - There is the opportunity to improve the content and information available on the website, including online bookings
- Marketing and Branding - The centres would benefit from a marketing strategy and clear branding.
- Pricing - There is an opportunity to simplify the membership structure and increase income from direct debit options.
- Reporting – Need for improvements for future performance monitoring and benchmarking.
- Training - Further training for staff would improve the level of information available to potential customers and the customer journey from initial contact to visiting the centres.

1.6. Key findings of the Financial Performance Review

1.6.1The table below summarise the key findings and opportunities of the income review.

Table 1 - Key Findings - Income Review

Income Stream	Summary	Benchmark	Key actions to achieve higher income
Total Income	Income per visit benchmarks for each centre are in the bottom quartile of SENBS. The range for the centres is between 48p - £2.27.	We would expect the smaller centres to achieve over £2.00 per visit with the larger ones and particularly the new centres at NLC and DLC to achieve £3.00-£4.00 per visit, however these expectations need to be aligned with admission pricing and proposed review,ie. If admission prices are lower than comparable benchmarks then it would be difficult to achieve target £ per visit.	Develop a clear and consistent sales process and culture to improve data capture and income conversion. Development of a leisure sub brand with a clear and transparent customer journey would assist this process. Training plan developed for all front of house staff to improve the upsell of facilities, services and activities to encourage increased participation and spend. Develop ICT for key stages of the proposed customer journey (from website to retention programmes) and deliver on-going refresher training for staff.
Health and Fitness	Health and fitness income at the centres has either remained static or decreased over the past two years. It would be expected that fitness income was the largest income stream of the centres, however it is either the 2nd or 3rd largest. All of the centres have latent demand and therefore scope to increase the membership base. The table below sets out the total latent demand.	Income per station at all centres is significantly lower than the industry standard of £8k - £12k per station. This is partly due to the high number of over 60's and less abled memberships which are extremely cheap. It is not known however, how many of these members are active users. If they do all use the centres regularly,	Pricing Review for all indoor leisure services and consider opportunities for innovative pricing strategies. Simplify membership prices and implement a sales process that aligns with proposed customer journey. (There would be further opportunities if the council wished to review its over 60's per annum charges – ie. To increase (even on a phased

Centre	Latent demand	Current members (excluding over 60's / less abled)	Potential additional members
Down LC	2094	287	1,807
Newry LC	2,402	1,296	1,106
Kilkeel	745	370	374
Newcastle	380	83	297
Total			**3,584**

The monthly yield per member is set out in the table below.

2015/16	NSC	KLC	BMOTE	DLC
Membership Yield	£16.25	£17.60	£23.69	£21.11

If the centres could take advantage of the latent demand, we believe additional income could be achieved as per the table below. This is a significant opportunity and would be built up after improvements to websites, the customer journey and simplified pricing structure. It is believed that the **growth would be over 4-5 years.**

Centre	Potential Income
NLC/NSC	£318,528
DLC	£457,749
KLC	£79,200
NEW	£96,121
TOTAL	**£951,598**

there could be capacity issues at Newry and Kilkeel. (However the new gym at Phase 2 Newry will alleviate this but again is unknown at this stage.)

approach), to review access entitlements and for example if it should be during peak/off peak times, to consider means tested application for concession pricing for this category. In addition, There would be further opportunities if the council wished to review its less abled scheme per annum charges.)

Review staff structures and resources to consider and officer dedicated to commercial income, branding and marketing across Indoor Leisure section

Invest in technology to modernise the customer facing offering – eg. website, mobile based apps, join online, class/course online bookings,etc

Invest in gym equipment to modernise centres and offer continuity of services across sites with same equipment supplier allowing for customer integration across the sites and availability of programmes, health assessments and associated technology being identified as a key retention tool

Upgrade / enhance gym in Kilkeel to enhance income opportunities and deal with capacity issues

Consider programming provision – ie. In house where possible to enhance income versus private operation

<table>
<tr>
<td>Swimming</td>
<td>Swimming income per m2 is lower than expected. With good pool configurations, we would expect NLC and DLC to achieve over £800 per m2.

DLC has seen a large drop in swimming income over the past two years, however overall, the Council by adopting the STA swim delivery model recently has improved continuity and consistency of service to customers

There are opportunities to review the programming to expand the number of pupils that could have lessons. This could result in additional annual income of £179,220 as per the table below.

<table>
<tr><th>Centre</th><th>Swimming lesson additional pupils per week</th><th>Net Price</th><th>Potential Income per annum</th></tr>
<tr><td>NLC</td><td>450</td><td>£4.04</td><td>£90,900</td></tr>
<tr><td>DLC</td><td>300</td><td>£4.04</td><td>£60,600</td></tr>
<tr><td>KLC</td><td>110</td><td>£4.04</td><td>£27,720</td></tr>
<tr><td>TOTAL</td><td></td><td></td><td>£179,220</td></tr>
</table>
</td>
<td>Industry standards of £500-£1,000 per m2.</td>
<td>Review programmes to specifically increase swim lesson provision however Council need to consider the balance of swim lessons, lane swimming, public recreational use and club/user group hire to maximise potential additional income opportunities

Consider a review of 1:1 lessons provision to ensure a fully managed and consistent quality programme for customers.

Consider pathways to be established into clubs.</td>
</tr>
<tr>
<td>Dryside</td>
<td>Whilst we have not been able to separate the different dryside income streams from the financials the expected income per court in the sports halls is higher than the current total income achieved.

This is reinforced by the low occupancy levels of the sports halls, which at 25%-50% is considerably lower than the industry norm, however is detailed within the Sports Facility Strategy, eg. There may be opportunities to increase utilisation and therefore income of these spaces by changing their use.</td>
<td>Industry standard occupancy rate of sports halls is 60%-80%.

Income per court of a standard 4-6 court hall is in the region of £15k - £25k per court.</td>
<td>Carry out a pricing review and depending on the local market conditions, opportunities for innovative pricing strategies could be driven through additional staffing resource as highlighted previously, ie. Commercial officer

There is a need to provide additional staffing resource to develop activity programmes with the sports halls via a programming review to increase participant levels, revenue, and coached activities.

We believe there are opportunities at</td>
</tr>
</table>

			the new Newry Leisure Centre in the future to consider a change of use of two of the badminton courts if occupancy and income targets are not met to include physical activity facilities for younger people as well as changing use of the squash court at Kilkeel. This would assist in meeting departmental objectives by increasing activity and will also have a positive impact on reducing low occupancy levels Examples include: clip and climb / adventure play / spa / specialist fitness – hot yoga / functional training / cross fit type facilities.

1.7. The levels of income currently achieved at the centres are below average in some areas, however there are a number of clear opportunities to improve performance, including but not limited to:

Area	Action
ICT	• Immediate review needed of ICT and the use of modern infrastructure across Indoor Leisure. • Council should be aiming to enhance website offerings and also provide access to online joining, bookings, mobile apps • consistent reporting of income and usage data across the service needed
Marketing and Branding	Leisure Specific Marketing and Branding Strategy needed to achieve a consistent service proposition: • development of a specific indoor leisure Sub brand that includes a clear and transparent journey and offering for the customer • development of a clear and consistent sales process and culture to improve data capture and income conversion • alignment of indoor leisure facility services, procedures and governance • investment in gym equipment to modernise centres and offer continuity of services across sites with same equipment supplier allowing for customer integration across the sites and availability of programmes, health assessments and associated technology being identified as a key retention tool • Additional staffing support such as an officer dedicated to commercial income, branding and marketing across Indoor Leisure section.
Pricing	Review of Leisure Pricing Strategy proposed: • Simplification of membership pricing structure • consider opportunities for innovative pricing strategies • consider options regarding over 60's and less abled scheme (price, eligibility and access permissions)
Opportunities for Income Generation	Develop further and implement proposals for opportunities for income generation through facility development and enhancements: • Newcastle • consider Kilkeel Leisure Centre to enhance potential income and potential capacity issues • Consider change of use for sports halls which may have positive impact on participation levels, reducing low occupancy levels and increasing income.
Programming	Consistency of activities needed along with general targeted programming and enhancement of sports development that will assist in increased participation and income levels: • swim lessons (to increase size of current programme) • Group exercise classes (ie. Follow Newry model) • review of coached activities in terms of in house provision versus outsource

	• consider and develop general targeted programmes that link with corporate objectives • need to provide additional staffing resource to develop activity programmes to realise participation and income targets
Resource	• Appointment of key personnel to maintain direction and delivery of action plan, ie. Leisure Specific Commercial Services Officer.
Linkage and Collaboration	• Closer links with outdoor leisure • Closer links with sports development • Closer links with health and well-being related departments • Above 3 links should increase participation levels and increase targeted programmes
Reporting	• Need for improvements for future performance monitoring and benchmarking that will influence delivery of the business plan action plan.
Training	• Further training for staff would improve the level of information available to potential customers and the customer journey from initial contact to visiting the centres.

1.8 The summary income and usage projections for each of the centres taking into account the improvements in the key areas as well as the projection income for the new centres is set out in the tables below:

Note: To ensure that the projections are achievable and realistic, taking into account current performance, competition and other risk factors the projections assume that:

- In a mature year, Newry Leisure Centre and Down Leisure Centre would achieve 70% of the potential projected income identified in section 7 and Kilkeel Leisure Centre
- In a mature year, Ballymote and Newcastle Leisure Centre would achieve 75% the potential projected income identified in section 7
- The income projections don't include proposed optimum swim lesson income growth as a full programming review is recommended to ensure a balance is achieved between extra swim lessons, public demand for lane swimming and recreational swim space along with a review of existing activities to include club/user group and private 1-2-1 use.
- The income projections assume that 50% of proposed optimum hall hire targets will be achieved
- Further review needed on casual usage income projections based on customer throughput

Table 2. Projected centre usage until 2020

Usage	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
NLC (NSC/NSP)	435,401	541,924	555,272	586,316	619,610	652,904	811,050
KLC	162,810	159,161	163,301	196,437	182,838	203,765	203,765
Bmote	NK	42,076	42,076	43,076	43,076	43,076	44,368
DLC	NK	167,668	188,015	192,515	209,862	360,000	432,000
NEW	362,431	389,883	418,395	418,395	418,395	418,395	430,947
Total		**1,300,712**	**1,367,060**	**1,436,739**	**1,473,781**	**1,678,140**	**1,922,131**

Table 3. Projected centre income until 2020

Income	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
NLC (NSC/NSP)	692,769	905,598	907,850	962,433	998,240	1,174,400	1,232,412
KLC	262,442	254,020	254,110	262,512	274,048	301,552	310,598
Bmote	67,728	74,523	74,523	79,523	79,523	79,523	81,113
DLC	407,665	369,337	405,871	423,142	442,068	671,040	861,580
NEW	227,271	188,768	198,380	202,158	213,145	227,911	234,748
Total	**1,657,875**	**1,792,246**	**1,840,733**	**1,929,767**	**2,007,025**	**2,454,426**	**2,720,453**

1.8.2 We have set out for the service a structure and example of an action plan to deliver against the key objectives.

2. Introduction

2.1. NMDDC, one of 11 new super councils, was created in April 2015. It is made up of the former Newry & Mourne and Down District Council areas. It also includes the Ballyward electoral area which previously sat within the Banbridge District Council authority. With a population of around 175,403 and a coastline of 100 miles, it is the third largest council area in Northern Ireland spanning from Crossmaglen in South Armagh to Saintfield in South Down.

2.2. Within the sports and leisure portfolio across the council area there are seven main leisure centres, as well as community centres and outdoor sports pitches.

2.3. The Council has committed significant capital resource into the leisure portfolio recently, including the new Newry Leisure Centre (phase 1 completed and phase 2 due for completion in May 2017) as well as Downpatrick Leisure Centre, that is due to be completed May 2018.

2.4. The Council has committed to develop a four-year Business and Action plan for the centres taking the service through to 2020. The report taken to Active and Health Communities June 2016, stated that 'by 2020, Indoor Leisure services should have an established sub brand that should include:

- A consistent service proposition across all of our indoor leisure facilities
- A consistent look and feel for all of our facilities
- A single pricing strategy
- Increased number of users and members
- Increased variety of programmes available
- Citizen focused service with improved customer engagement
- Modern infrastructure across the estate
- Improved use of technology'

2.5. In order to achieve the above, Max Associates has completed a service review of the centres to assess future opportunities and support officers to map out the Council's vision to achieve the objective. They key areas the service review focuses on are:

- catchment area demographic analysis and competition review;
- review of the centres' key income areas to assess whether the potential is being realised; and an
- overview of the potential income for the two new centres.

2.6. The centres within scope of this review include:

- **NLC - Newry Leisure Centre** (formerly Newry Swimming Pool) - phase 1 opened April 2015 (phase 2 currently on site and due to complete May 2017)
- **NSC - Newry Sports Centre** (will close when Newry Leisure Centre phase 2 completes in May 2017)
- **SCSC - St Colmans Sports Complex**
- **KLC - Kilkeel Leisure Centre**
- **Down Leisure Centre** (will close once new Down Leisure Centre is completed estimated July 2018)
- **BMOTE - Ballymote Sport and WellBeing Centre**
- **NEW - Newcastle Leisure Centre**

3. Strategic Context

3.1. The strategic context of the centres is set out below to assess the national and regional approach to sport and physical activity.

3.2. DCMS Sporting Future: A new strategy for an Active Nation (December 2015)

3.1.1 This cross-government strategy aims to tackle head on the flat lining levels of sport participation and high levels of inactivity in the country. Through the strategy, the government is redefining what success in sport means, with a new focus on five key outcomes: physical wellbeing, mental wellbeing, individual development, social and community development and economic development. The government has made it clear that funding decisions will be made on the basis of the outcomes that sport and physical activity can deliver.

3.1.2 It is the government's ambition that all relevant departments work closer together to create a more physically active nation, where children and young people enjoy the best sporting opportunities available and people of all ages and backgrounds can enjoy the many benefits that sport and physical activity bring, at every stage in their lives.

3.1.3 The strategy recognises that local authorities have an important leadership role in bringing schools, clubs, NGBs, health and the private sector together to forge partnerships. With the devolution of public health from the NHS to local authorities, many have started a policy shift that treats ill-health to promoting wellbeing.

3.3. Sport Matters…a culture of lifelong enjoyment and success in sport - The Northern Ireland Strategy for Sport & Physical Recreation 2009 – 2019.

3.1.4 This document outlines a broader Government commitment to sport and physical recreation – a commitment that extends beyond any single department or organisation and permeates the decision-making and investment processes of the Government of Northern Ireland.

3.1.5 The strategy identifies 26 high level targets and sets the key strategic priorities for sport and physical recreation over ten years and informs investment by all stakeholders across the public, private and community/voluntary sectors.

3.1.6 The high level targets are structured to reflect the needs of sport and physical recreation. These relate to:

- PARTICIPATION
- PERFORMANCE
- PLACES

3.1.7 The Strategy notes that improving the quality, quantity and access to places for sport is a key development input to the two primary development outcomes of increased participation in sport and physical recreation and improved sporting performances.

3.1.8 In delivering against each of the 26 high level targets, this Strategy will:

- Increase the number of children and adults experiencing, enjoying and participating in high quality sporting opportunities;
- Enable an increasing number of our most talented athletes to achieve at the highest level in their sport, including European, world, Commonwealth and Olympic/Paralympic competition; and
- Ensure that every person in Northern Ireland has access to a range of new, improved and shared world-class and locally available sports facilities.

3.1.9 The Targets of the strategy are outlined below and PA7 – PA11 directly relate to increasing participation, which the centres can directly impact.

Table 4 - Sport Matters Strategy - Targets

PARTICIPATION

PA 1. By 2009, to have agreed and commenced implementation of a revised research framework for participation rates that is cognisant of the recommendations of the Chief Medical Officers in the UK

PA2. By 2010 to have reviewed the economic impact of sport and physical recreation in Northern Ireland

PA3. By 2011, to have established a baseline for the number of children of compulsory school age participating in a minimum of two hours quality29 per week physical education

PA4. By 2013, to have stopped the decline in adult participation in sport and physical recreation

PA5. By 2014 to have increased the number of people in Northern Ireland in membership of at least one sports club

PA6. By 2014 to provide every child in Northern Ireland over the age of 8 years with the opportunity to participate in at least two hours per week of extra-curricular sport and physical recreation

PA7. By 2019 to deliver at least a 3 percentage points increase in adult participation rates[28] in sport and physical recreation (from the 2011 baseline)

PA8. By 2019 to deliver at least a 6 percentage points increase in women's participation rates in sport and physical recreation (from the 2011 baseline)

PA9. By 2019 to deliver at least a 6 percentage points increase in participation rates in sport and physical recreation among socio-economically disadvantaged groups (from the 2011 baseline)

PA10. By 2019 to deliver at least a 6 percentage points increase in participation rates in sport and physical recreation among people with a disability (from the 2011 baseline)

PA11. By 2019 to deliver at least a 6 percentage points increase in participation in sport and physical recreation among older people (from the 2011 baseline)

PERFORMANCE

PE 12. By 2010 to have a fully operational Sports Institute that supports 100 athletes per annum to achieve 70% of their agreed annual performance targets

PE13. By 2010 to win at least five medals at the Delhi Commonwealth Games

PE14. By 2011 to ensure that all Sport Northern Ireland funded governing bodies and sporting organisations are 'fit for purpose' organisations

PE15. By 2014 to win at least five medals at the Glasgow Commonwealth Games

PE16. By 2019 to have implemented nationally recognised coach accreditation systems all Sport Northern Ireland funded governing bodies

PE17. By 2019 at least 100 Northern Ireland athletes to have attained medal success at the highest level in their sport including European, World and Olympic/Paralympic level

PE18. By 2019 to have accredited at least 700 appropriately qualified, full-time coaches available to meet demand across all aspects of sport and physical recreation

PE19. By 2019 to have 45,000 appropriately qualified, part time and volunteer coaches available to meet demand across all aspects of sport and physical recreation

PE20. By 2019 to have secured a world class[3] system for athlete development consisting of services, facilities and competition following the hosting of the Olympic and Paralympic Games in London 2012

PLACES

PL 21. By 2010 to initiate a Northern Ireland certification process that will improve safety management and the fabric of the major stadiums in Northern Ireland, to comply with the Safety of Sports Grounds (Northern Ireland) Order (2006) and associated technical guidance

PL22. By 2014, and subject to Executive approval, to have developed major sports stadiums to meet the strategic needs of Football, GAA and Rugby on an operationally viable and commercially sustainable basis in Northern Ireland

PL23. By 2014 to have a minimum of 10 new or upgraded facilities that will support Northern Ireland player/athlete development in Olympic and Paralympic sports

PL24. By 2015 to have amended public policy frameworks to protect and promote access to and sustainable use of publicly-owned land in Northern Ireland for sport and physical recreation

PL25. By 2019 to ensure that 90% of the population have quality accredited, multi sports facilities, that have the capacity to meet demand, within 20 minutes travel time

PL26. By 2019 to ensure that all planning decisions follow Planning Policy Statement 8: Open Space, Sport and Outdoor Recreation in relation to the provision of spaces for sport and physical recreation

3.4. Engagement in Culture, Arts and Leisure[1]

3.4.1. In 2015/16, almost nine out of every ten adults (89%) had engaged in some way with culture, arts and leisure. This was similar to the engagement rate in 2014/15 and to comparable engagement rates since 2011/12.

3.4.2. In 2015/16, more than half of adults in Northern Ireland (53%) had participated in sport and physical activity within the last 12 months, a similar figure to 2014/15 (55%). A target was set in the strategic document Sport Matters, to halt the decline in sports participation by 2013. This was achieved in 2013 and has been maintained in the following two years.

3.4.3. In 2015/16 around half of adults (47%) normally participated in sport and physical activity on at least one day a week. This figure was similar to the previous year, 2014/15 (49%).

3.4.4. More than a fifth of adults (21%) were members of a sports club in 2015/16, which is also similar to the previous year, 23% in 2014/15.

3.4.5. Over the time period from 2007/08, sport participation by adults living in the most deprived areas of Northern Ireland initially decreased before returning to 46% in 2015/16. Sport participation by adults living in the least deprived areas has remained relatively static over the same time period at around 65%.

3.4.6. A literature review (DCAL, 2015) explored engagement in sport, arts, museums and libraries for older adults and identified a number of barriers to engagement. Further research used logistic regression to explore these barriers further and to identify the factors associated with engagement in culture, arts and leisure by older people.

3.4.7. The report found that, of those aged over 50, there were:

- 29% who participated in sport or physical activity;
- 28% who participated in arts activities;
- 57% who attended arts events;
- 25% who used a library; and
- 22% who visited a museum
  all during the year prior to being asked.

3.4.8. The factors which appear consistently as having the most influence on an older persons engagement across the culture, arts and leisure areas are their level of educational attainment, i.e. having a degree or higher qualification; their socio-economic classification, i.e. classified as being in managerial and professional occupations; and their use of the internet.

[1] DCAL – Engagement in Culture, Arts and Leisure 2015/16 - www.communities-ni.gov.uk/publications/engagement-culture-arts-and-leisure-by-adults-northern-ireland-201516

3.5. Widening of outcomes

3.5.1. As being reflected by the government and Sport England strategies, and recognised by local authorities for some time, 'sport' is no longer delivered solely for 'sport' sake and that increasing participation in sport and physical activity and reducing levels of in-activity are key to both local and national government to achieve outcomes in public health (physical and mental), adult social care and education.

3.5.2. A recent report completed by Sheffield Hallam university reviewed the social return of investment into sport in England. It concluded that for every £1 spent on sport, £1.91 of benefits are generated in health and other related outcomes.[2]

3.6. Reducing Council Budgets

3.6.1. However, at the time when the importance of sport and physical activity is being heralded, local authority budgets are reducing, therefore local authorities across the country are investigating either alternative management models to deliver leisure services to reduce subsidies or investing into their stock to increase usage, and income and reduce maintenance costs to reduce subsidy levels.

3.7. Fitness Market and Swimming Participation

3.7.1. We have included below an overview of the fitness market nationally and swimming participation, as these, for many local authority operators the largest areas of usage and income generation and both national and local trends will need to be considered for any future development of the facilities in Newry, Mourne and Down.

3.7.2. Fitness Market

3.7.3. The majority of adults have at least one health or fitness goal, including an improving general health and fitness (54%), aim to lose weight (44%), build muscle/strength (29%), relax/de-stress (26%) and improve their cardiovascular fitness (25%)[3].

3.7.4. The following analysis comes from the 2015 State of the UK Fitness Industry report[4]. The report reviewed both the private and local authority market and included reviews on; penetration rates, average gym sizes and average membership prices across both sectors. The key findings relevant to this prospectus:

- Average penetration rate of 5.2% for public facilities, compared to 8.5% for private facilities
- The average membership fee is £30.05 in public facilities compared to £41.76 at private facilities
- The top 10 private operators have an average of 115 stations, 62% have a wet facility with an average fee of £50.66.

[2] Social Return on Investment in Sport: A participation wide model for England – April 2016
[3] Mintel - Health and Fitness Clubs 2016
[4] The Leisure Database Company 2015

- The public sector gym has an average of 45 stations and 51% have a wet facility, however the top 10 operators have an average of 61 stations an average fee of £33.47 and 67% have a wet facility.

- However, low cost clubs have an average size gym of 143 stations, an average membership charge of £18.23 and are almost all dry facilities.

- The growth of the low cost club is effecting the mid-market clubs, who are having to explore new ways to keep their market share. (Studios or premium end of the market).

- With planned acquisition and growth, the rapid expansion of the low cost club does not look to be slowing down in the future.

3.7.5. Mintel has also noted the polarisation of the industry[5]. 'Budget gyms have attacked the lower end of the market with aggressively priced memberships meanwhile the premium full-service health clubs (with pool and other facilities) have looked to deliver an enhanced service in order to justify their additional cost. The success of the former has certainly brought new people into the market. However, it has cannibalised the premium and to a certain extent the mid-market as some members have chosen to trade down to lower-cost alternatives.'

3.7.6. Swimming Participation

3.7.7. Swimming participation has been dropping in recent years. A Sport England press release following the publication of the Active Places survey in June 2015, stated; "a further drop in the number of people swimming once a week has again dominated the latest grassroots sports participation figures, which were published today. Swimming, the country's most popular sport with over 2.5 million people taking part weekly, has seen 144,200 fewer people taking to the pool in the last six months and 390,700 in the last year. The long term trend is also very concerning, with 729,000 people stopping swimming in the last decade."

3.7.8. To offset these reductions in casual participation, many operators have developed their learn to swim programmes; transferring to continuous assessment, 48-52 week teaching and payment via direct debit. This has led to swimming income uplifts offsetting the decline in casual swimming income.

3.7.9. These findings are considered in the review of the current performance of centres (paragraph 7.11).

[5] Mintel – Health and Fitness Clubs UK July 2015

4. Local Context to the Performance Review

4.1. Demographic Profile of the Council[6]

4.1.1. The Newry & Mourne District extends form Newtownhamilton in the West to Annalong in the East and from Donaghmore in the North to Crossmaglen in the South. The District covers 6.4% of the land area (90,937 hectares) of Northern Ireland.

4.1.2. The estimated population of Newry, Mourne and Down Local Government District at 30 June 2014 was 175,403, of which 86,833 (49.5%) were male and 88,570 (50.5%) were female.

4.1.3. This was made up of:

- 39,602 children aged 0-15 years;
- 55,053 people aged 16-39 years;
- 55,557 people aged 40-64 years; and
- 25,191 people 65 years and older.

4.1.4. Between 2004 and 2014 the population of Newry, Mourne and Down Local Government District (2014) increased by 16,943 people or 10.7%.

4.1.5. The population of Newry, Mourne and Down aged 60+ is expected to rise to 58,141 by 2037 (28.4% of the projected population for Newry, Mourne and Down).

4.1.6. The projected number of households in Newry, Mourne and Down Local Government District in 2014 was 63,961 while for 2024 the number of households is projected to be 70,251.

4.1.7. In 2014, the 16-64 employment rate in Newry, Mourne And Down Local Government District was 72.1%. The overall 16-64 employment rate for Northern Ireland was 67.7%.

4.1.8. The average number of people aged 16-64 in Newry, Mourne and Down Local Government District claiming Job Seekers Allowance (JSA) in 2014 was 5,050, representing a claimant count annual average rate of 4.6%. This compares with a claimant count rate for Northern Ireland of 4.6% in 2014.

4.1.9. In 2014, the proportion of total claimants who were long-term unemployed was 36.8% (NI: 34.2%).

4.1.10. In 2014, the estimated number of overnight trips in Newry, Mourne and Down Local Government District was 571,175 with an associated number of 1,488,281 nights stayed and expenditure of £54.28 million during these overnight trips.

[6] www.nirsa.gov.uk – Area Profile

4.1.11. In 2014, youth claimant count rate (aged 18-24) in Newry, Mourne and Down Local Government District was 7.5% (NI: 7.8%).

4.1.12. Life expectancy for males in Northern Ireland for 2010-2012 was 77.7 years, and for females is 82.1 years. Life expectancy for males in Newry, Mourne and Down LGD2014 for 2010-2012 was 78.0 years, and for females is 82.3 years.

4.1.13. The level of deprivation of the District is outlined in the map and table below. The Extent Score shows the percentage of an area's population living in the most deprived Super Output Areas (SOAs) in the country.

Figure 1 - Deprivation Map

Rank of Deprivation where 1 is the most deprived.

Table 5- Deprivation in Newry, Mourne and Down

	Newry, Mourne And Down value	**Newry, Mourne And Down** rank	**NI** value
Population (2008)	170,000	-	-
Extent	14%	3	18%
Number of people income deprived	43,900	3	-
Percentage of population income deprived	26%	3	25%
Number of people employment deprived	13,000	4	-
Percentage of working age population employment deprived	13%	4	13%

4.1.14. Local Government Districts (2014) are ordered from most deprived to least deprived on each indicator of deprivation and then assigned a rank. It can be seen from the map and table that Newry, Mourne and Down is ranked 3/11 for deprivation (where 1 is the most deprived).

4.1.15. Within Newry, Mourne and Down the most deprived Super Output Area based on the IDAOP measure is Crossmaglen, where 82% of older people were income deprived (ranked 26 out of 890 in NI). The least deprived Super Output Area based on the IDAOP measure is Saintfield 2, where 10% of older people are income deprived (ranked 864 out of 890 in NI).

4.2. Catchment Analysis and Latent Demand for Fitness

4.2.1. To understand the dynamics of member catchment and future demand at the leisure facilities we commissioned the Leisure Database Company (LDC) to undertake a latent demand assessment.

4.2.2. Using the LDB's unique supply demand model which takes into account competition and local demographics, they estimated the latent demand for fitness at each site. This gives the most accurate and robust estimation of potential membership base at each fitness facility.

4.2.3. The detailed mosaic reports can be found in **Appendix 1** and latent demand reports in **Appendix 2.**

4.2.4. The newly formed Newry, Mourne and Down District Council area covers much of the south eastern part of Northern Ireland. Leisure Database has estimated the latent demand for fitness at four leisure centres across the district which largely cover different areas. The largest, in terms of population size, is Newry, with almost 30,000 people living within two miles, rising to almost 38,000 within a ten minute drive. The smallest is Kilkeel, with around 8,000 people within two miles, which only rises slightly to just under 10,000 within a ten minute drive (this is due to the coastline to the south and west, mountains to the north and only one main road heading in and out of town).

4.2.5. The latent demand assessments for both NLC and DLC are based on the new facility mixes. It is assumed that the facilities at KLC and NEW will remain largely the same.

4.2.6. For Downpatrick & Newry (locations of the two new leisure centres), we have estimated a 15 minute drive time as the core catchment area; this is where we estimate the majority of members will travel from. Of the member data we had access to it was found that 86% of current members live within a 15 minute drive of Newry Leisure Centre. For Kilkeel, we have also used a 15 minute drive time because the leisure centre has very little competition and also the road network in the area means that this drive time does not stretch as far as the larger towns. For Newcastle Centre, the smallest in terms of gym size (and also the only one with no indoor pool), the assessment is based on a 10 minute drive time.

4.2.7. There are no significant overlap areas between these catchments and in each case, the drive time covers the primary population centre(s).

4.2.8. **Down Patrick Leisure Centre (New Facility)**

4.2.9. <u>Catchment Area & Demographics</u>

4.2.10. There are just over 11,000 people within two miles of the new DLC and this area encompasses the population of the town. The 15 minute drive time adopted as the core catchment is home to 37,834 people and in terms of area, 15 minutes stretches further than four miles in all directions. Aside from the Downpatrick population, a 15 minute drive includes Crossgar and Killyleagh to the north / north east, Clough and Dundrum to the west, Killough and Ardglass to the south and Strangford to the east.

4.2.11. Almost 20% of locals fall into group D (Small Town Diversity) and this is quite diverse in terms of age distribution and type of household, but generally prominent in small towns. Although a mixture, most tend to be in the older age brackets (i.e. 50s and 60s). Some of these people will be self-employed but in general, household incomes are modest. The prominent type here is D19 (Innate Conservatives) and these are generally retired married couples with comfortable lifestyles living in low density estates on town fringes. A high proportion also fall into D18 (Hardworking Families); these tend to be older married couples, usually over 55, but still working and with reasonable disposable income.

4.2.12. Over 16% of the local population fall into Mosaic group I (Ex-Council Community). These people tend to be self-reliant, hard workers, many of them council tenants with comparatively low disposable incomes. They are mostly middle-aged people, some of whom are over-stretched with debt.

4.2.13. The next largest segment is more affluent: almost 15% of the population fall into group B (Professional Rewards) and in particular, type B05 (Mid-Career Climbers). These are generally families where the parents are in their 40s and 50s with secondary school aged children. They have the affluence for premium products and would be a good target for a brand new leisure centre that offers facilities for both parents and adults.

4.2.14. <u>Competition</u>

4.2.15. Balleymote is less than a mile away from the new leisure centre. This is a much smaller dry facility, and therefore not directly comparable to the new centre.

4.2.16. The Bridge Centre in Killyleagh is the only other gym within the core catchment. It is located just on the edge of the 15 minute drive time. It has a small station gym and two court sports hall that are operated by the NMDDC.

4.2.17. <u>Latent Demand</u>

4.2.18. We have estimated the latent demand for the new DLC to be **2,094**, this is the total number of members that could be achieved. Within this figure, we have allowed for 20% of the total to come from outside the catchment area, slightly higher than is currently being achieved at NLC to account for the lack of competition in or around the catchment area.

4.2.19. According to the membership data provided Down Leisure Centre currently has 287 members with access to the fitness facilities. Consequently, the latent demand projection shows the potential for a further **1,807** members at the new centre.

4.2.20. **Newry Leisure Centre (New facility)**

4.2.21. Catchment Area & Demographics

4.2.22. Almost 30,000 people live within two miles of the new NLC and this area encompasses the population of the town. The 15 minute drive time we have adopted as the core catchment is home to 56,373 people and in terms of area, 15 minutes stretches further than four miles in all directions. Aside from the Newry population, a 15 minute drive includes Bessbrook just to the west of the A1, parts of Burren and Warrenpoint to the south east and Mayobridge to the east.

4.2.23. In terms of demographics, this area has some similarities with Downpatrick, but also a number of differences. There are still above average numbers from groups D (Small Town Diversity – 15%) and I (Ex-Council Community – 17%). Numbers from the affluent group B (Professional Rewards), however, are below average in this catchment.

4.2.24. Unlike Downpatrick the Newry catchment has larger proportions of groups F (Suburban Mindsets) and G (Careers and Kids); the former accounts for almost 16% of locals while the latter makes up almost 12%.

4.2.25. Those in group F tend to be middle aged married couples with school-age children, living in suburban semis. Incomes are fairly good and they are generally a good target for fitness membership. Those in group G tend to be a bit younger, with most in their 30s and 40s; they are affluent families with young children, often with both parents working and household incomes above average. They live in nice comfortable homes and this group tends to be a good target for health and fitness (especially at venues that also have facilities for children/families).

4.2.26. Competition

4.2.27. There are two private independent gyms within two miles of the new NLC. Aside from these, there are no other fitness competitors within the 15 minute core catchment.

4.2.28. Re-Flex Gym is very close to the new centre, but has a strong body building focus with the majority of equipment being resistance machines and free weights. It charges £25 per month or £7 for a day pass.

4.2.29. Just less than two miles to the north east, in the Ashtree Enterprise Park, is Gym Tech. It has a large (c. 100 station) gym, two studios and a group cycling studio along with sauna and steam room. It is estimated to have over 1,000 members paying £34 per month.

4.2.30. Latent Demand

4.2.31. The latent demand for the new NLC is estimated to be **2,402**, this is the total number of members that could be achieved based on the new facility mix (100 station gym). Within this figure, we have allowed for 15% of the total to come from outside the catchment area, roughly what is being achieved at the moment. It is unlikely that this will increase significantly with the new Centre, especially with Banbridge Leisure Centre just to the north of the Newry catchment.

4.2.32. According to the membership data provided NSC currently has **1,296** members with access to the fitness facilities (excluding the 'protected' memberships costing £3.45 for over 60s and £11.80 for Less Abled and staff memberships). Consequently, the latent demand projection shows the potential for a further **1,106** members at the new centre.

4.2.33. **Kilkeel Leisure Centre**

4.2.34. <u>Catchment Area & Demographics</u>

4.2.35. The leisure Centre in Kilkeel is the most southerly, not just in the district but in Northern Ireland as a whole. The 15 minute drive time around this centre is not as large as Newry or Downpatrick, partly because it has the sea to the south and west but also due to the road network; the A2 is the primary road that cuts through Kilkeel, coming from Newry in the west to Newcastle in the east, hugging the coastline for large parts.

4.2.36. Just over 8,000 people live within two miles of KLC and this area encompasses the population of the town. The 15 minute drive time we have adopted as the core catchment is home to 14,136 people and in terms of area, 15 minutes reaches four miles in all directions but does not extend further than this. Aside from the Kilkeel population, a 15 minute drive includes Ballymartin, around three miles to the east and Lisnacree, around four miles to the west. It also reaches the outskirts of Annalong and includes some of that population.

4.2.37. In terms of demographics, Kilkeel is the most rural of all catchment areas. 28.7% of local people fall into group C (Rural Solitude), which consists of residents of small villages and isolated homes where farming and tourism are the mainstays. They are reasonably affluent and in terms of age, they tend to be in the 50+ bracket. The prominent type here is C13 (Modern Agribusiness); these people are between the ages of 46 and 65, married and often have grown-up children living at home with them. They are mostly self-employed as farmers, or in some business connected to agriculture. Some of them also run bed-and-breakfasts or work in local restaurants and pubs.

4.2.38. Similar to Newry and Downpatrick, there are also above average numbers coming from groups D (Small Town Diversity); it makes up over a quarter of the Kilkeel population. Many of these are 'Innate Conservatives' (type D19) but there are also good numbers from type D17 (Jacks of All Trades). This particular type is slightly younger than the average for group D, consisting of people from mid-30s to mid-50s. Many are families with children, probably at secondary schools, where one or both parents have a trade of some sort.

4.2.39. A further 13% fall into group I (Ex-Council Community), slightly lower than the numbers found around Newry and Downpatrick. Numbers from the affluent group B (Professional Rewards), are also below average in the Kilkeel catchment.

4.2.40. Competition

4.2.41. There is only one other health and fitness offering in Kilkeel, Life Builders Gym. This is a small 15-20 station community gym charging £12 per month.

4.2.42. Latent Demand

4.2.43. We have estimated the latent demand for KLC, assuming the facilities remain largely the same, to be **745**, this is the total number of members that could be achieved. Within this figure, we have allowed for 15% of the total to come from outside the catchment area; very few people actually live outside the Kilkeel catchment area because of the Mourne Mountains to the north.

4.2.44. According to the membership data provided KLC currently has **370** members with access to the fitness facilities (excluding the 'protected' memberships costing £3.45 for over 60's and £11.80 for Less Abled). Consequently, the latent demand projection shows the potential for a further **375** members at the centre.

4.2.45. **Newcastle Centre**

4.2.46. Catchment Area & Demographics

4.2.47. Newcastle is also on the coast and therefore its drive time does not stretch too far. The only road out of town to the south is the A2 so the ten minute drive time largely follows this road for about four miles. The Mourne Mountains are to the west, hence the lack of population in this area. To the north, ten minutes stretches up the A50 Newcastle Road to take in most of Castlewellan. To the north east, the drive time reaches Dundrum and overlaps very slightly with the southern part of the Downpatrick catchment.

4.2.48. Just over 8,000 people live within two miles of NEW and this area encompasses the majority of the town. The 10 minute drive time adopted as the core catchment is home to 13,245 people. A 15 minute drive time would significantly overlap with the Downpatrick catchment and it is unlikely that people would travel that far for the facilities at NEW.

4.2.49. In terms of demographics, the population of Newcastle is most similar to that of Newry. The same 3 Mosaic groups are prominent but here, group D (Small Town Diversity) accounts for almost a third of all people (31.3%). Again, type D19 (Innate Conservatives) stands out, with almost 19% falling into this one type. These are generally retired married couples with comfortable lifestyles living in low density estates on town fringes.

4.2.50. Over 13% of the local population fall into Mosaic group I (Ex-Council Community). These people tend to be self-reliant, hard workers, many of them council tenants with comparatively low disposable incomes. They are mostly middle-aged people, some of whom are over-stretched with debt.

4.2.51. Finally, the affluent group B (Professional Rewards) makes up over 10% of local people, a figure which is largely in line with the Northern Ireland average. Again, the majority of these fall into type B05 (Mid-Career Climbers) – families where the parents are in their 40s and 50s with secondary school aged children. They can afford to pay more for their leisure activities, so may choose to use one of the private clubs in the area which also offer pools and studios.

4.2.52. Numbers in the family oriented group G (Careers and Kids) are just above average, making up just under 10% of locals. These are affluent parents with young children who would be a good target for leisure centre membership.

4.2.53. Competition

4.2.54. The only competitors close to NEW are two hotel based private clubs. The 'premium' club at Slieve Donard Resort & Spa has a 30 station gym, 20m swimming pool and studio. It charges £120 per month and has around 300 members.

4.2.55. Burrendale Hotel & Country Club has a slightly bigger gym (40 stations), 12.5m swimming pool and studio and charges c. £50 per month.

4.2.56. Latent Demand

4.2.57. We have estimated the latent demand for NEW (assuming the facilities remain largely the same) to be **380**, this is the total number of members that could be achieved. Within this figure, we have allowed for 20% of the total to come from outside the catchment area; this accounts for those in Dundrum who may prefer not to drive into Downpatrick but also those people living north of the Dublin Road, in places such as Ballyward which have no facilities of their own.

4.2.58. According to the membership data provided NEW currently has **83** members with access to the fitness facilities (excluding the 'protected' memberships costing £3.45 for over 60s and £11.80 for the Less Abled). Consequently, the latent demand projection shows the potential for a further **297** members at the centre.

4.2.59. **Summary Latent Demand**

4.2.60. The table below summarises the potential new members at each centre.

Table 6: Latent demand summary

Centre	Latent demand	Current members (excluding over 60's / less abled)	Potential additional members
Down LC	2094	287	1,807
Newry LC	2,402	1,296	1,106
Kilkeel	745	370	374
Newcastle	380	83	297
Total			**3,584**

4.3. Competition

4.3.1. The review below sets out the competing facilities for each activity area for each leisure centre. This allows us to understand the level of competition each centre faces.

4.3.2. **Downpatrick Leisure Centre**

4.3.3. <u>Swimming Competition</u>

4.3.4. The map below shows all swimming competition within a 40 minute drive of DLC.

Figure 2 - DLC Swimming Competition Map

Table 7 - DLC Swimming Competition

Map Ref	Facility	Travel Time	Adult Casual Price	Junior Casual Price
	Downpatrick Leisure Centre	**0**	**Reference Only**	**Reference Only**
	Newcastle Centre	22	**Reference Only**	**Reference Only**
	Lisburn Leisureplex	33	**£6.90** (peak) **£6.40** (off peak)	**£5.30** (peak) **£4.80** (off peak)
	Andersonstown Leisure Centre	37	**£4.15** (price rise on 1st August 2016)	**£2.10** (price rise on 1st August 2016)
	Banbridge Leisure Centre	40	**£3.50**	**£2.30**

4.3.5. It can be seen that other than NEW all other competition is over a 30 minute drive away and therefore given our understanding of member catchments we would not consider these facilities to be competing directly with Downpatrick Leisure Centre.

4.3.6. The facilities at NEW are only seasonal and therefore pose limited competition to DLC.

4.3.7. <u>Gym Competition</u>

4.3.8. The map below shows the fitness competition within a 20 minute drive.

Figure 3 - DLC Gym Competition Map

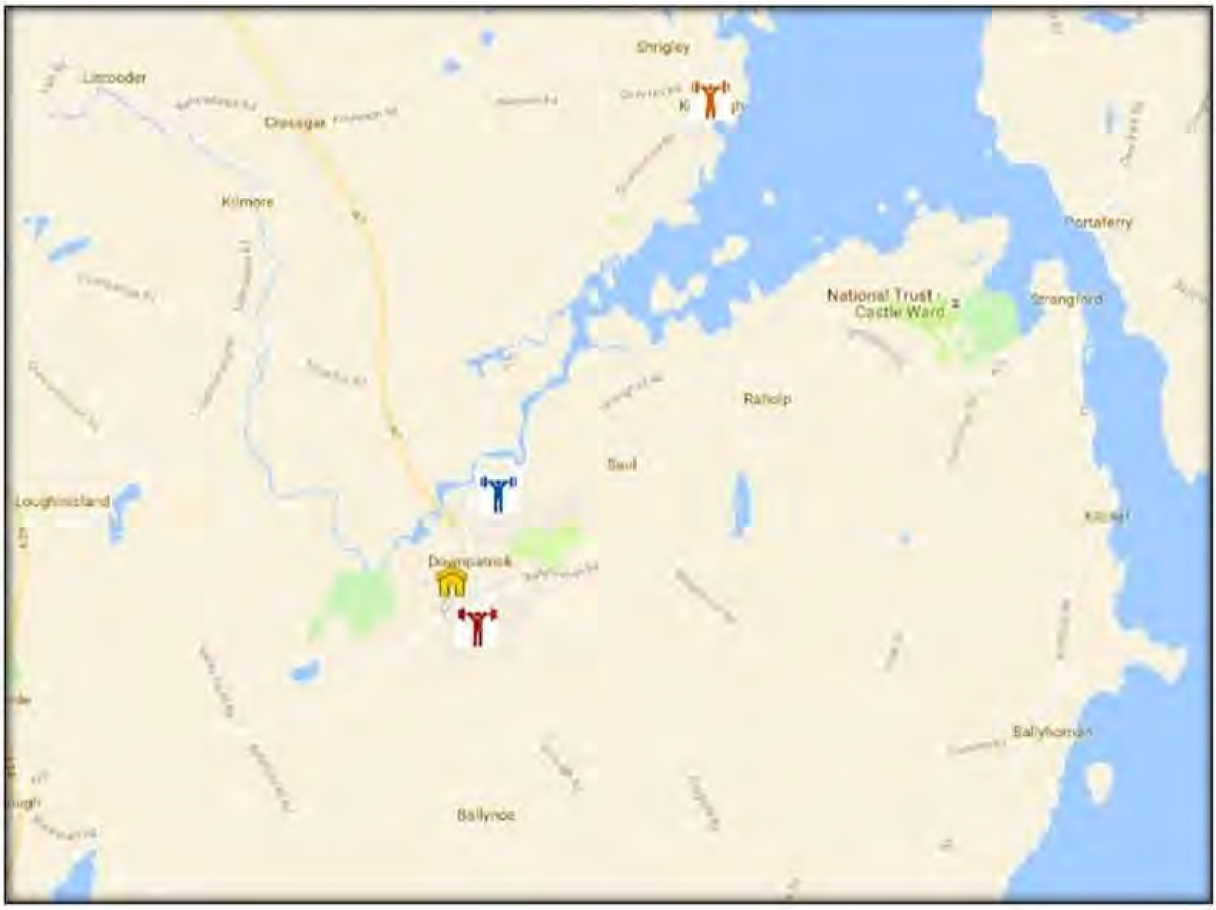


Table 8- DLC Gym Competition

Map Ref	Facility	Travel Time (minutes)	Membership Price	Membership Package	Casual Price
	Downpatrick Leisure Centre	**0**	**Reference Only**	**Reference Only**	**Reference Only**
	Pulse Fitness Downpatrick Ladies Only Fitness Studio	5	**£35.00** Direct Debit per month	Gym and Classes	**£5.00**
	Ballymote Sports And Wellbeing Centre, Downpatrick	5	**Reference Only**	**Reference Only**	**Reference Only**
	Bridge Centre	12	**Reference Only**	**Reference Only**	**Reference Only**

4.3.9. As a ladies only studio offering, Pulse fitness is not directly comparable to the DLC offer.

4.3.10. The other two facilities are also operated by the Council. BMOTE is a smaller community facility and does not have any wet facilities. We would expect most families with younger children to prefer visiting DLC due to the mix of facilities on offer.

4.3.11. <u>Sports Hall Competition</u>

4.3.12. The map below shows sports hall competition within a 25 minute drive.

Figure 4 - DLC Sports Hall Competition Map

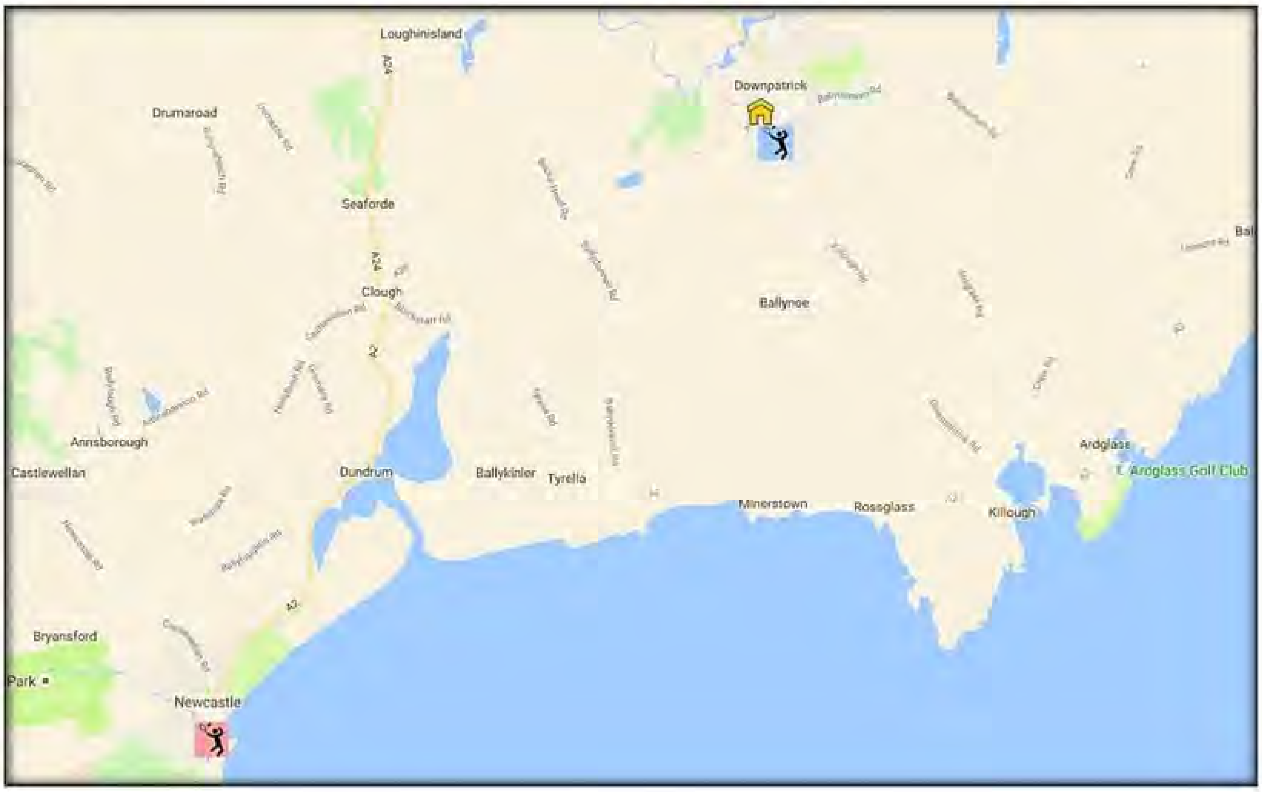


Table 9 - DLC Sports Hall Competition

Map Ref	Facility	Travel Time (minutes)	Half Hall Hire Price	Whole Hall Hire Price
	Downpatrick Leisure Centre	**0**	**Reference Only**	**Reference Only**
	Ballymote Sports and Wellbeing Centre	5	**Reference Only**	**Reference Only**
	Newcastle Centre	22	**Reference Only**	**Reference Only**

4.3.13. NEW only has one badminton court and is therefore unable to offer the same activities that you would expect in a typical sports hall e.g. five-a-side football.

4.3.14. BMOTE has four badminton courts, which is the same as the proposals for the new sports hall at DLC. Resulting in the provision of 8 courts within the town.

4.3.15. Squash Competition

4.3.16. The map below shows squash competition within a 40 minute drive of DLC.

Figure 5- DLC Squash Competition Map

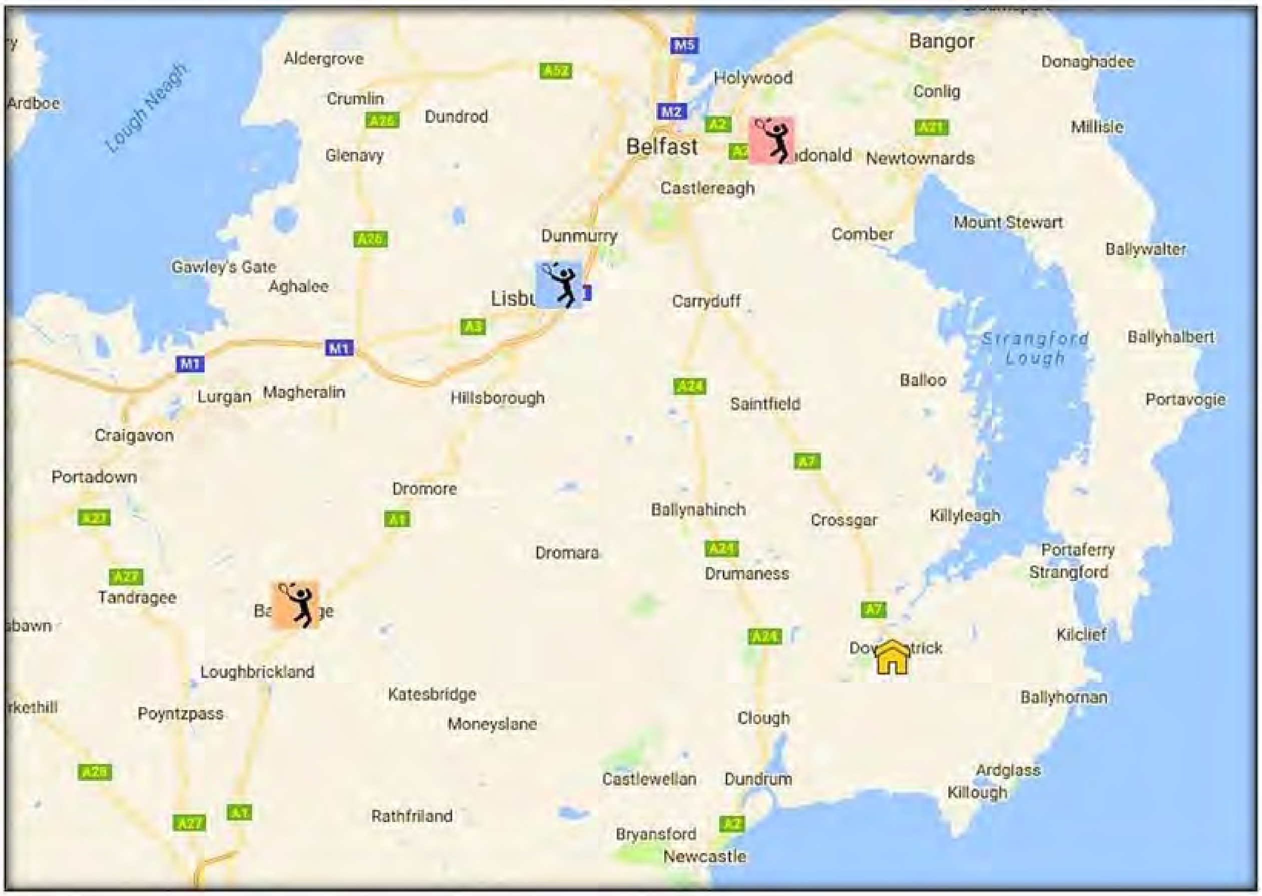


Table 10 - Squash Competition

Map Ref	Facility	Travel Time	Cost per 40 minute court
	Downpatrick Leisure Centre	0	**Reference Only**
	Glenmore Activity Centre	35	**£5.50** (peak) **£2.50** (off peak)
	Activ Health Club	36	**£5.00** non member
	Banbridge Leisure Centre	40	**£6.25**

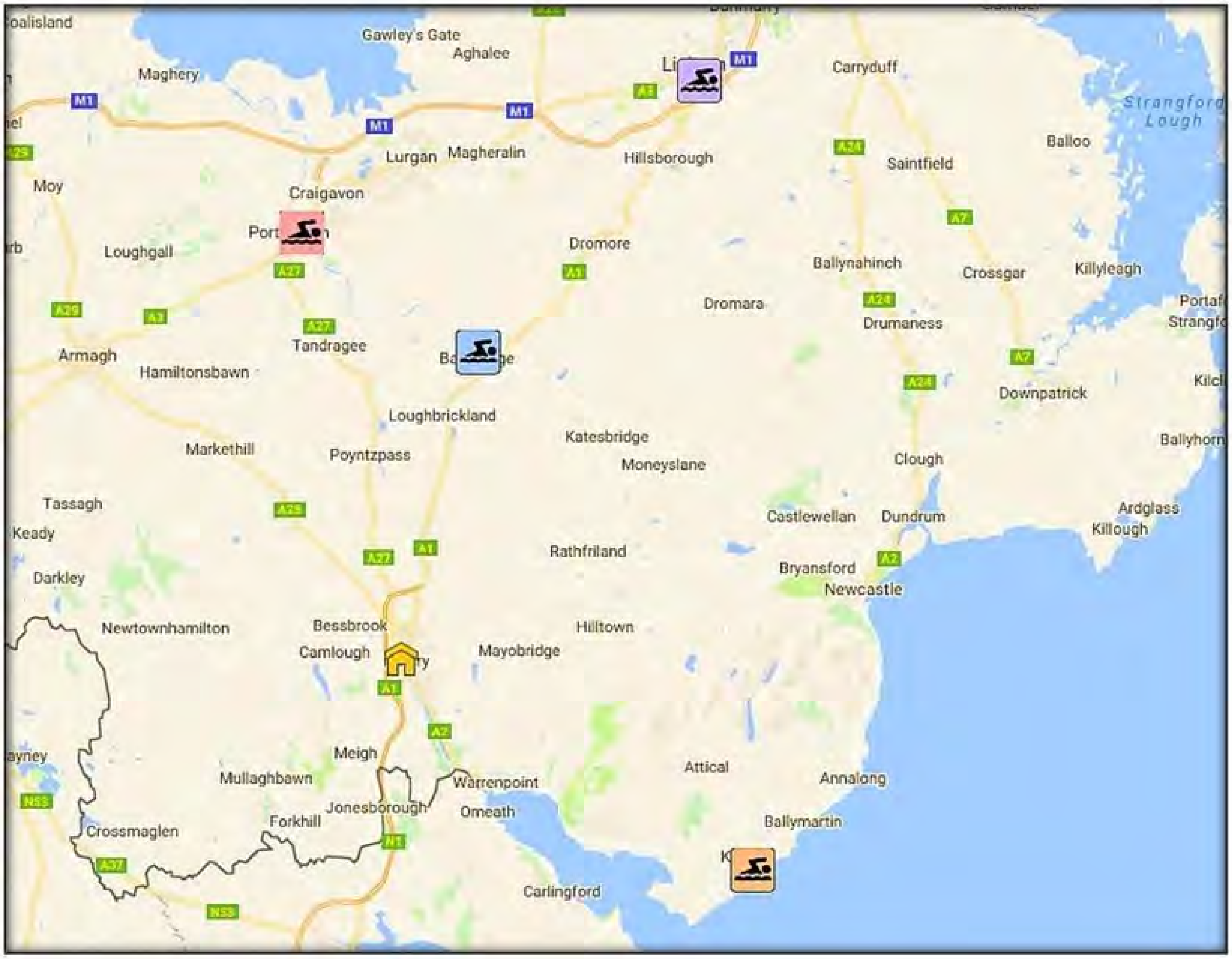
4.3.17. All other squash provision is over a 30 minute drive from DLC, therefore DLC should be the first choice for squash within the catchment area.

4.3.18. **Newry Leisure Centre**

4.3.19. Swimming Competition

4.3.20. The map below shows all swimming competition within a 40 minute drive of NLC.

Figure 6 - NLC Swimming Competition Map



Map Ref	Facility	Travel Time	Adult Casual Price	Junior Casual Price
	Newry Leisure Centre	**0**	**Reference Only**	**Reference Only**
	Banbridge Leisure Centre	18	**£3.50**	**£2.30**
	Cascades Leisure Complex	32	**£3.50**	**£3.30**
	Lisburn Leisureplex	33	**£6.90** (peak) **£6.40** (off peak)	**£5.30** (peak) **£4.80** (off peak)
	Kilkeel Leisure Centre	35	**£2.95**	**£2.20**

Table 11 - NLC Swimming Competition

4.3.21. The closest facility is Banbridge Leisure Centre, an 18 minute drive away, it has a 6 lane main pool, a learner pool, a leisure pool and a toddler pool. It also has a 50m water slide and health suite.

4.3.22. We would consider this to be the most significant competition to NLC due the scale of the water offer as well as offering other ancillary facilities such as a gym, studio, sports hall and crèche. However, Armagh Leisure Centre and Felda Health Fitness and Spa in Southern Ireland also have pools.

4.3.23. However, it should be noted that since the new pools at NLC opened to the public casual swim income has more than doubled and therefore the competition does not appear to have had a detrimental effect on uptake.

4.3.24. <u>Gym Competition</u>

4.3.25. The map below shows all fitness competition within a 20 minute drive of NLC.

Figure 7 - NLC Gym Competition Map

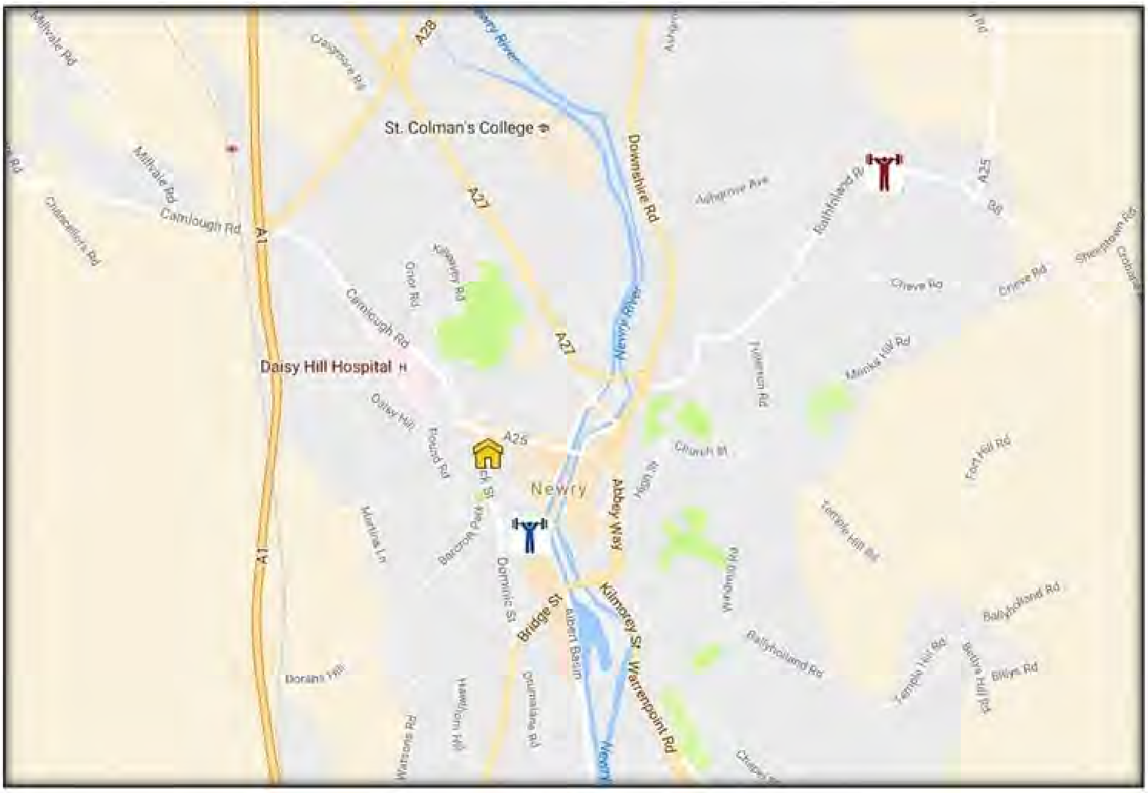


Table 12 - NLC Gym Competition

Map Ref	Facility	Travel Time (minutes)	Membership Price	Membership Package	Casual Price
	Newry Leisure Centre	**0**	**Reference Only**	**Reference Only**	**Reference Only**
	Reflex Gym Newry	2	**£25.00** per month (plus **£5.00** joining fee)	Gym and classes	**£7.00**

	Gym Tech	6	**£40.00** (5 - month contract)	All inclusive	**£6.00**
			£34.00 (5 - month contract)	Gym only	
			£34.00 (5 - month contract)	Classes only	

4.3.26. The Reflex Gym has a strong body building focus and is therefore unlikely to detract members from NLC.

4.3.27. Gym Tech is the most comparable offer to NLC with a large gym and studios, however it does not have a swimming pool.

4.3.28. Sports Hall Competition

4.3.29. The map below details all sports hall competition within a 25 minute drive.

Figure 8 - NLC Sports Hall Competition Map

Table 13 - NLC Sports Hall Competition

Map Ref	Facility	Travel Time (minutes)	Half Hall Hire Price	Whole Hall Hire Price
	Newry Leisure Centre	**0**	**Reference Only**	**Reference Only**
	Banbridge Leisure Centre	18	n/a	**£40.00**

4.3.30. As with swimming Banbridge Leisure Centre is the nearest competitor. However, we would anticipate that when the new sports hall is complete that those living within Newry and the surrounding areas would choose NLC as the main sports hall facility, rather than travel to Banbridge.

4.3.31. <u>Squash Competition</u>

4.3.32. Squash competition within a 40 minute drive is detailed in the map below.

Figure 9 - NLC Squash Competition Map

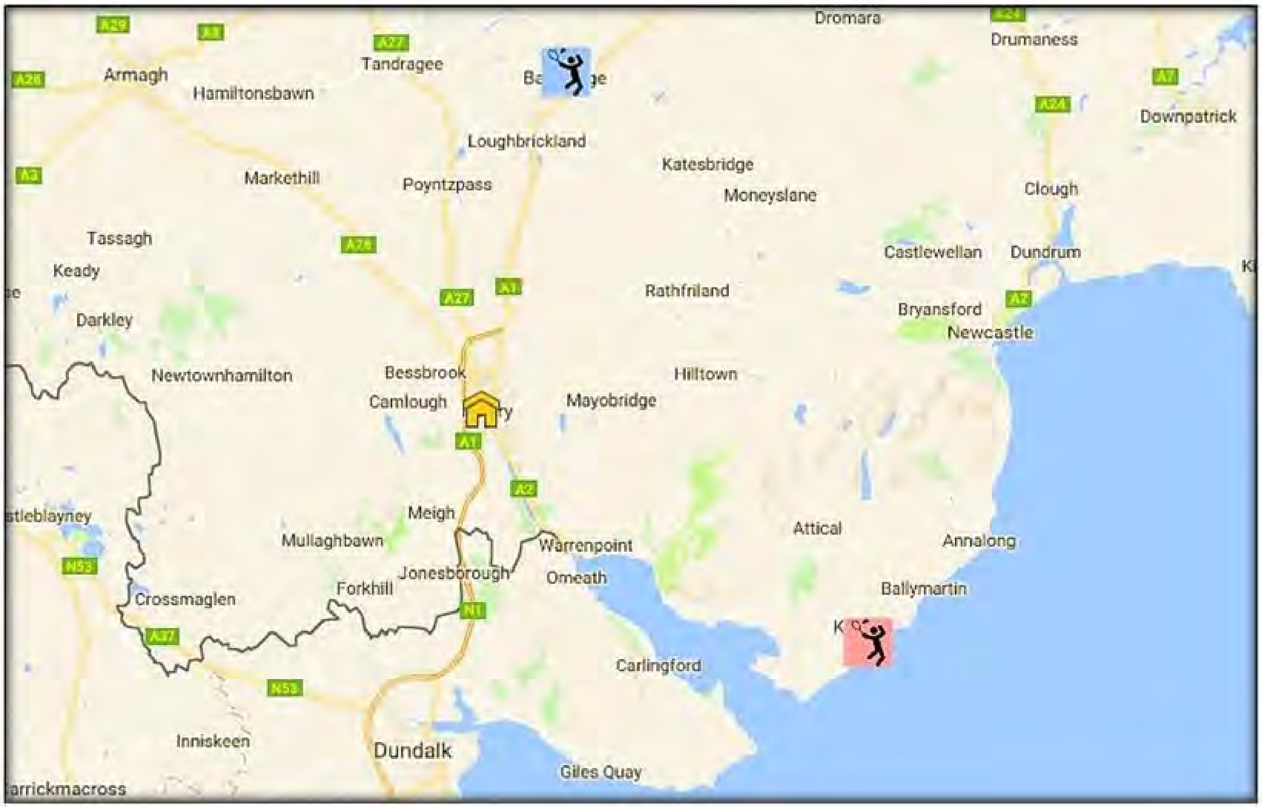


Table 14 - NLC Squash Competition

Map Ref	Facility	Travel Time	Cost per 40 minute court
	Newry Leisure Centre	**0**	**Reference Only**
	Banbridge Leisure Centre	18	**£6.25**
	Kilkeel Leisure Centre	35	**£6.45**

4.3.33. KLC only has one squash court and being over a 30 minute drive away it is very unlikely that it will impact on the usage of the courts at NLC.

4.3.34. **Kilkeel Leisure Centre**

4.3.35. Swimming Competition

4.3.36. The map below shows swimming competition within a 40 minute drive of KLC.

Figure 10 - KLC Swimming Competition Map

Table 15 - KLC Swimming Competition

Map Ref	Facility	Travel Time	Adult Casual Price	Junior Casual Price

	Kilkeel Leisure Centre	**0**	**Reference Only**	**Reference Only**
	Newry Swimming Pool	36	**£2.95**	**£2.20**

4.3.37. Burrendale Hotel, Country Club & Spa is at 27 minutes' drive time however, it is only for members or those undergoing spa treatment, and children are not allowed.

4.3.38. <u>Gym Competition</u>

4.3.39. The map below shows gym competition within a 20 minute drive of KLC.

Figure 11 - KLC Gym Competition Map

Table 16 - KLC Gym Competition

Map Ref	Facility	Travel Time (minutes)	Membership Price	Membership Package	Casual Price
	Kilkeel Centre	**0**	**Reference Only**	**Reference Only**	**Reference Only**
	Life Builders Gym	7	**£12.00** monthly (Joining fee of **£20.00**)	Gym only.	**None.**

4.3.40. Whilst there is minimal competition within a 20 minute drive time between 20 minutes and 35 minutes' drive there is the following fitness provision.

- Yogalisa - 25 minutes' drive time
- Burrendale Hotel, Country Club & Spa - 27 minutes' drive time
- Go Figure Ladies Fitness Studio - 28 minutes' drive time

- Bodyrox Health and Fitness - 34 minutes' drive time
- Crossfit Infected - 35 minutes' drive time

4.3.41. <u>Sports Hall Competition</u>

4.3.42. The map below shows all sports hall competition within a 25 minute drive.

Figure 12 - KLC Sports Hall Competition Map

Table 17 - KLC Sports Hall Competition

Map Ref	Facility	Travel Time (minutes)	Half Hall Hire Price	Whole Hall Hire Price
	Kilkeel Leisure Centre	**0**	**Reference Only**	**Reference Only**
	Newcastle Centre	22	**Reference Only**	**Reference Only**

4.3.43. Other than the NEW sports hall provision there is no other competing facilities within a 25 minute drive.

4.3.44. <u>Squash Competition</u>

4.3.45. The map overleaf shows all squash provision within a 40 minute drive.

Figure 13 - KLC Squash Competition Map

Table 18 - KLC Squash Competition

Map Ref	Facility	Travel Time	Cost per 40 minute court
	**Kilkeel Leisure Centre**	**0**	**Reference Only**
	Newry Sports Centre	34	**Reference Only**

4.3.46. NSC is the only competitor and offers two courts. The only reason squash players within the catchment may venture to NSC is to participate in league matches, which usually requires a minimum of two courts.

4.3.47. **Newcastle Leisure Centre**

4.3.48. <u>Swimming Competition</u>

4.3.49. The map below shows swimming competition within a 40 minute drive of NEW.

Figure 14 - NEW Swimming Competition Map

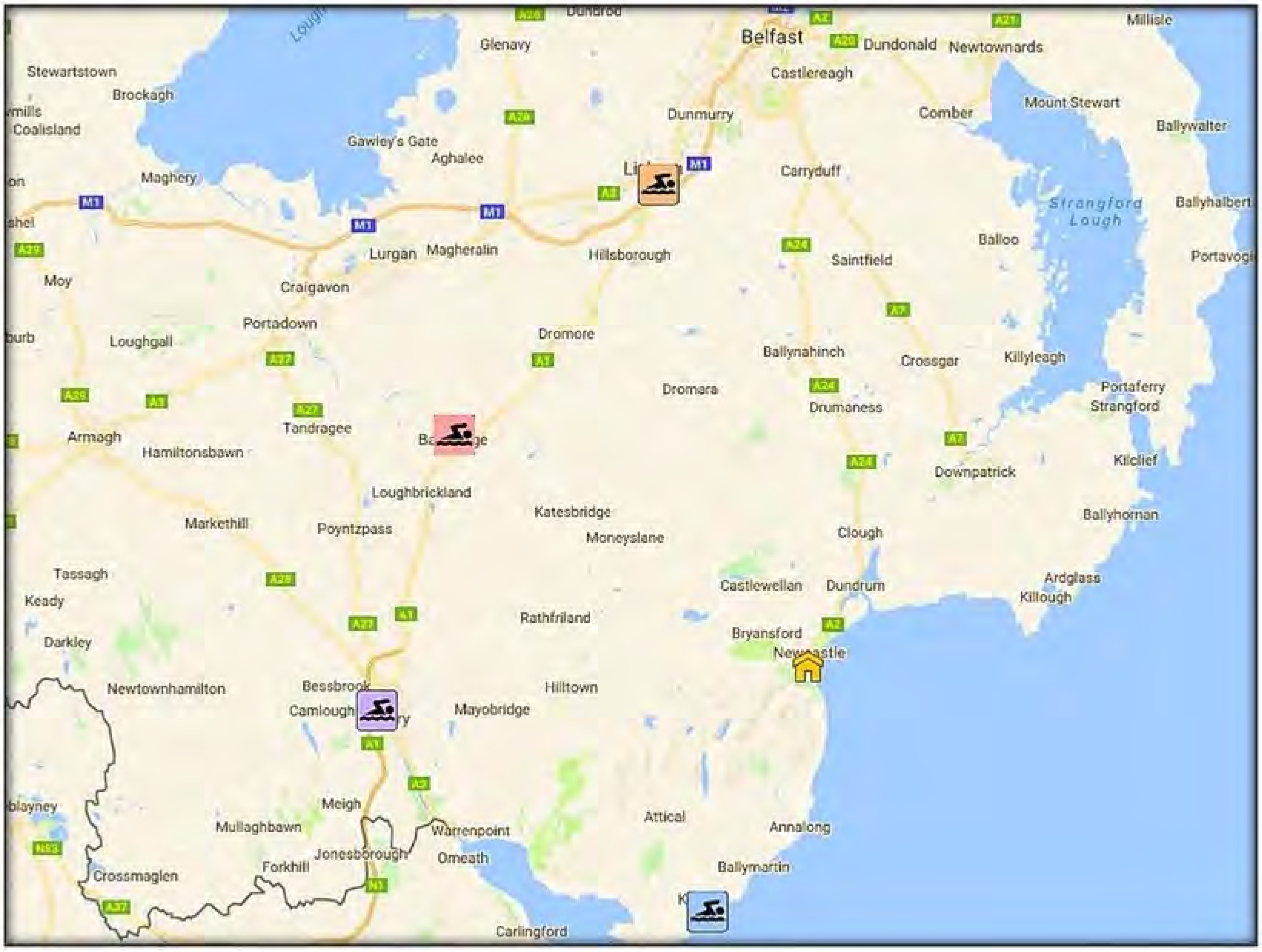


Table 19 - NEW Swimming Competition

Map Ref	Facility	Travel Time	Adult Casual Price	Junior Casual Price
	Newcastle Centre	0	**Reference Only**	**Reference Only**
	Kilkeel Leisure Centre	24	**£2.95**	**£2.20**
	Banbridge Leisure Centre	31	**£3.50**	**£2.30**
	Newry Swimming Pool	39	**£2.95**	**£2.20**
	Lisburn Leisureplex	40	**£6.90** (peak) **£6.40** (off peak)	**£5.30** (peak) **£4.80** (off peak)

4.3.50. The closest facility at KLC, whilst outside the core catchment area will be the main pool facility for residents when the pools at NEW are closed.

4.3.51. During the peak season the pools at NEW should be able to attract users from further afield as a tourist destination.

4.3.52. <u>Gym Competition</u>

4.3.53. The map below shows gym competition within a 20 minute drive of NEW.

Figure 15 - NEW Gym Competition Map

Table 20 - NEW Gym Competition

Map Ref	Facility	Travel Time (minutes)	Membership Price	Membership Package	Casual Price
	Newcastle Centre	**0**	**Reference Only**	**Reference Only**	**Reference Only**
	Slieve Donard Resort and Spa	4	**£120.00** Direct Debit (**£250.00** joining fee)	Gym, Swim, Classes and Spa	**n/a**
	Burrendale Hotel, Country Club & Spa	6	**£50.00** Direct Debit (**£60.00** joining fee)	Gym, Swim and Classes.	**n/a**

	Crossfit Infected	9	**£90.00** Direct Debit	Gym and Classes	**£10.00**

4.3.54. Go Figure Ladies Fitness Studio at five minutes' drive time has no website available.

4.3.55. Bodyrox Health And Fitness at 11 minutes' drive time has permanently closed.

4.3.56. As high end private offers the competition should not pose a significant threat to NEW.

4.3.57. **Ballymote Sport and Wellbeing Centre**

4.3.58. Gym Competition

4.3.59. All fitness competition within a 20 minute drive of BMOTE are detailed on the map below.

Figure 16 - BMOTE Gym Competition Map

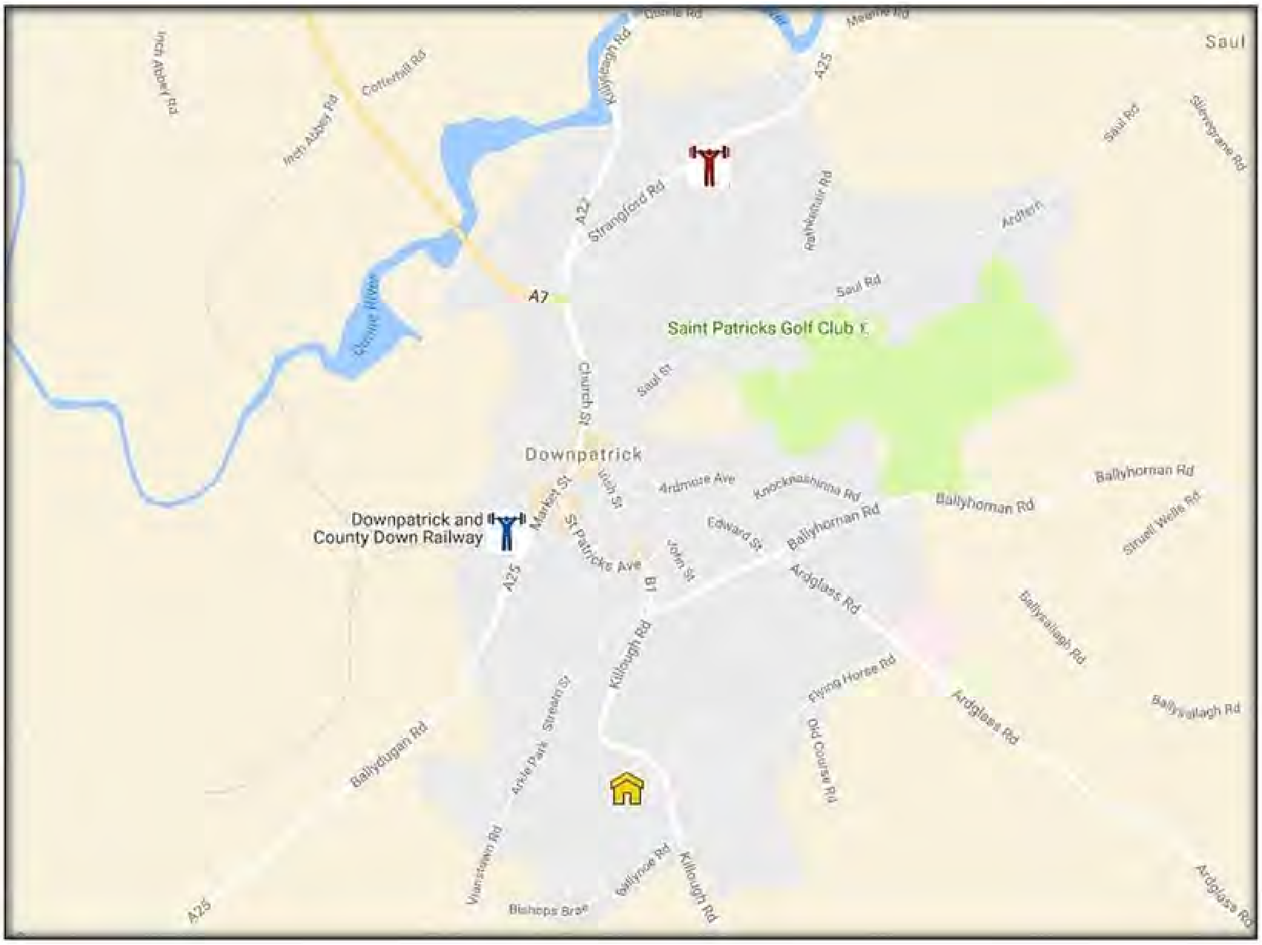


Table 21 - BMOTE Gym Competition

Map Ref	Facility	Travel Time (minutes)	Membership Price	Membership Package	Casual Price
	Ballymote Sport and Wellbeing Centre	**0**	**Reference Only**	**Reference Only**	**Reference Only**
	Down Leisure Centre	7	**£24.75**	Gym, Swim, Sauna and Steam	**£4.95**
	Pulse Fitness Downpatrick Ladies Only Fitness Studio	8	**£35.00** Direct Debit per month	Gym and Classes	**£5.00**

4.3.60. As a ladies only offer Pulse Fitness is not considered to be direct competition to BMOTE.

4.3.61. When the new facilities open at DLC this could impact on the potential membership growth at BMOTE due to its close proximity.

4.3.62. Sports Hall Competition

4.3.63. The map below shows the sports hall competition within a 25 minute drive of BMOTE.

Figure 17 - BMOTE Sports Hall Competition Map

Table 22 - BMOTE Sports Hall Competition

Map Ref	Facility	Travel Time (minutes)	Half Hall Hire Price	Whole Hall Hire Price
	Ballymote Sport and Wellbeing Centre	**0**	**Reference Only**	**Reference Only**
	Down Leisure Centre	7	**n/a**	**£25.00**

4.3.64. The new DLC sports hall will have six courts, which may attract larger events and clubs away from BMOTE. However, we would expect BMOTE to continue to serve smaller community groups.

4.4. Facility Strategy

4.4.1. The Council has recently (July 2016) drafted a Sports Facility Strategy to provide a framework for the future prioritisation, development and provision of sports facilities at a local level.

4.4.2. The Vision underpinning the Strategy is:

'Development of an evidence based assessment of facility need, which will inform and prioritise future investment in, and development of, a network of high quality sports facilities, addressing the needs for increased community participation in Newry, Mourne & Down District Council'

4.4.3. The Strategy reflects the wider – NI 10 Year Plan for the provision of Strategic Sports Facility Strategy for Northern Ireland (2016), which focuses on the need for future provision that are of cultural significance, as well as those that provide for high performance training and competition.

4.4.4. The key findings of the strategy are:

4.4.5. <u>Sports Halls</u>

- The demand modelling suggests there is a deficit of ten badminton court secured sports halls in 2016 and 17 badminton court secured sports halls in 2037. If the number of badminton court sports halls that are provided in Education establishments (37 badminton courts) that are not fully open for community use are considered, this would eliminate any need for additional sports hall space in the future to 2037. This would mean putting into place community use agreements with schools and meets Sport NI Key Principle 7. Where possible new and/or improved school sports facilities should be designed and managed in a way that enables community use.
- The district has three or four court sports hall provision within a 20 minute drive time of its residents
- There is a need to replace NEW in the future

4.4.6. <u>Swimming Pools</u>

- There will be a need for additional water space in Newry Mourne and Down going forward to 2037. This is roughly equivalent to a 4 lane 25m pool (212sq m).
- Consideration should be given to providing an indoor swimming pool alongside any future indoor leisure provision in Newcastle.

4.4.7. <u>Pitches</u>

- There is a need for five 3G rubber crumb pitches for soccer. There are currently eight 3G rubber crumb pitches of which five solely provide for soccer across Newry, Mourne and Down.
- There is a need to provide a sand based all-weather pitch at Saintfield to replace the outdated shale hockey pitch and a need to replace the carpet at McAuley Park where Kilkeel Hockey Club play.

4.4.8. Other Facilities

- There is a need for an athletics facility in and around Downpatrick/Newcastle.
- Consultation identified that the District could benefit from enhanced yachting and wet sports facilities at various harbours but specifically Annalong, Newcastle, and Dundrum.
- The Council should consider a partnership approach to the development of a bubble to cover two tennis courts at either Newry Tennis Club or Newcastle Tennis Club to provide a facility within the local authority that provides for all year round tennis.

4.5. Local Context Summary

- The total population of the Newry, Mourne and Down Government District is 175,403 (June 2014) with the 40-64 age bracket being the most dominant.
- The District has an aging population with the 60+ age group expected to rise to 28.4% of the projected population by 2037.
- With regards to health and employment statistics the District generally preforms on par with the Northern Ireland averages. However, it is one of the highest ranked areas of deprivation.
- Each of the centres show latent demand potential, with the opportunity for significant growth at NLC and DLC, with latent demand of 1,106 and 1,807 respectively.
- There is minimal competition for each of the centres in all activity areas, with the majority of competition coming from other local authority provision.
- It is recognised that there is a need to review/replace provision at NEW in the future.
- Demand modelling shows need for additional badminton courts, however this should be reviewed against an assessment of occupancy of the existing facilities as well as developing the opportunity for community use of school sports facilities.
- There will be a need for additional water space in the future and this should be considered as part of the future development of NEW.

5. Service Delivery – Quality

5.1. Website Review

5.1.1. **Newry Leisure Centre**

www.newrysportscentre.com

5.1.2. General Information

5.1.3. The leisure centre's location, contact information and opening hours are clearly visible. The timetable of fitness classes is clearly visible as a panel on the right-hand side of the website on every page. However when you click on the link for the full timetable, it simply takes you to a blank page; this is the same for many links within the website.

5.1.4. Facilities

5.1.5. A brief description of facilities within the leisure centre is provided, though this is not very detailed.

5.1.6. Prices / Membership

5.1.7. The gym membership page clearly details the three types of membership, their price per month, and what is included within the membership package. It also states that other memberships for different activities are available, however little information is provided for these, only a contact telephone number.

5.1.8. **Down Leisure Centre**

http://www.downdc.gov.uk/Leisure---Culture/Leisure-Centres/Down-Leisure-Centre-(1).aspx

5.1.9. General Information

5.1.10. Opening times for the fitness suite, swimming pool, and overall leisure centre are clearly stated. The leisure centre's location and contact information are also easily accessible.

5.1.11. Facilities

5.1.12. There is a clear and concise list of facilities available within the leisure centre. However no information on the equipment present within the fitness suite is provided.

5.1.13. Prices / Membership

5.1.14. Special offers on use of the fitness suite and other facilities are clearly advertised on the website. A document is available named 'Price List Changes', detailing price increases from April 2016. It is unclear whether this contains prices for all activities, or only those which have increased since the previous year. This document details pay-as-you-go prices, as well as a monthly price for Gym, Swim, and Sauna/Steam. It is assumed that this is the membership price; however that is not specifically stated.

Clearer information on membership prices, what is included, and whether there are different membership package options, would be an improvement.

5.1.15. Application Forms

5.1.16. An application form can be downloaded from the website for the People with Disabilities Scheme.

5.1.17. Further Observations

5.1.18. After the 'Lecale Fitness Suite Opening Times' section, there is reference to further information on "the Fitness Suite PDF below", however this document is not available on the website. There is also a small spelling mistake in that sentence of the fitness section, where 'clink' should be 'click'.

5.1.19. **Kilkeel Leisure Centre**

http://www.newryandmourne.gov.uk/leisure/Facilities/Kilkeel_Leisure_Centre.aspx

5.1.20. General Information

5.1.21. The leisure centre's location, contact information and opening hours are clearly visible. A brochure detailing the day/time of classes, their price and a brief description of what the class involves is useful. A pool timetable is also available.

5.1.22. Facilities

5.1.23. The website contains a clear, concise list of facilities within the leisure centre. A detailed description of the equipment within the fitness suite is accompanied by photographs, giving a clear visual demonstration.

5.1.24. Prices / Membership

5.1.25. While there is clear information on what facilities are included within the membership package, no information is provided on the price of gym membership, or use of facilities on a pay-as-you-go basis. Only a contact telephone number is given for further details.

5.1.26. **Newcastle Centre**

http://www.downdc.gov.uk/Leisure---Culture/Leisure-Centres/Newcastle.aspx

5.1.27. General Information

5.1.28. The leisure centre's location, contact information and opening hours are clearly visible. The range of activities you can participate in at the centre is provided.

5.1.29. Facilities

5.1.30. No information is available on what facilities are present within the Newcastle Centre.

5.1.31. Prices / Memberships

5.1.32. No information is provided on memberships, although prices for some fitness classes are provided on the timetable of activities (separate PDF link). Three information and registration form links are advertised on the website, but they are broken links, taking you to a "Page Not Found" website page.

5.1.33. Overall the website contains very little information on prices, membership, and details of what facilities there are.

5.1.34. **Ballymote Sport and Wellbeing Centre**

http://www.downdc.gov.uk/Leisure---Culture/Leisure-Centres/Ballymote-Sports-and-Wellbeing.aspx

5.1.35. General Information

5.1.36. The leisure centre's location, contact information and opening hours are clearly visible. A range of documents are present containing information on different activities.

5.1.37. Facilities

5.1.38. The website contains detailed information on the different types of equipment available within the fitness suite, which is very useful. Information on other facilities, such as parking and activities within the hall, are also clearly stated.

5.1.39. Prices / Memberships

5.1.40. The main website page provides a brief information on the starting price of the fitness memberships, as well as what groups have concessionary rates. Offers on membership, such as summer membership, is also advertised. After this first glance, the detailed price list, on a separate document to the main page, is very useful, with clear and concise information. Providing price details for a range of scenarios (members, non-members, concessions, pay-as-you-go etc.) means no further information needs to be sought by the customer. The prices are available for the fitness suite as well as all other facilities, equipment hire and classes.

5.1.41. Summary

5.1.42. The presentation and level of information provided is inconsistent across the web pages, with very limited branding. There is also no opportunity for online booking or joining. As a minimum we would suggest that the web pages need to include the following information:

- Contact details/online enquiry form
- Facility mix available
- Activity timetables for core areas
- Price List
- Details of membership structure and packages (including prices)
- Images of the centre/facilities
- Details of swimming lesson provision

- Details of other activities and courses taking place within the centres
- Recent news articles
- Links to social media outlets
- Clear calls to action for people

5.2. Marketing

5.2.1. There is a clear opportunity to improve the level and quality of the marketing across all centres, on our site visits there was no evidence of branding or consistent internal marketing standards. For example, on our site visits there were a number of notice boards with various information displayed, there did not appear to be a set way in which information was presented to make it accessible for all users, as demonstrated in the photo below.

Figure 18 - Example Notice Board

5.2.2. There is currently no Marketing Strategy for the Leisure Services, which is the likely cause of the lower than expected standards.

5.2.3. Consequently this has an impact on the overall customer journey, which varies across the centres. Implementing a marketing and branding strategy would align and improve the customer journey.

5.2.4. We would expect the centres to have a marketing strategy covering the following key elements:

- Branding approach for core activities – fitness, swimming, children's activities etc.
- Internal marketing standards – how posters/leaflets should be displayed consistently across sites

- Competitor Analysis for core activity areas and an understanding of needs and demand
- Online marketing plan – content management for web pages, online enquires, online bookings
- Approach to implementing and managing social media
- Action Plan to implement marketing strategies

5.3. Pricing

5.3.1. Having reviewed the membership options the structure appears to be complicated with numerous options at each centre. The pricing also varies across the options with significant reductions for the over 60's and less abled membership options.

5.3.2. There are also short term three and six month memberships as well as cash options.

5.3.3. We understand that at Newcastle, all memberships are cash only; no direct debit option is offered.

5.3.4. When the Councils merged all of the prices were lifted to the highest price point, whilst this created some consistency across the centres, it did have a negative impact for customers.

5.3.5. Consequently, there is an opportunity to:

- Simplify the membership structure and make the options and pricing consistent across all centres
- Implement direct debit options at all centres
- Limit the short term and cash offers and encourage direct debit options to secure ongoing income
- Review the concessions policy eligibility and pricing

5.3.6. It is noted that the low level of pricing for the over 60's and less abled membership options is very rare at only £3.45 per year. Most council's offer a concessionary membership, but at a 50% - 60% of full membership price levels.

5.3.7. A simpler pricing structure would also allow the implementation of online booking and joining. We have shown below a screen shot of the online booking system for GLL's leisure centres in Belfast. It is evident how simple the joining process is at these sites with customers having the choice of five types of memberships, whether they want to pay monthly or annually, and whether they want an all-inclusive membership or swim only. The total cost to the customer is clearly displayed on the right of the screen and adjusts with each option that is selected.

Figure 19 - Example Online Booking Form

5.4. Mystery Shop Review

5.4.1. As part of the service review we undertook a mystery shop, involving two phone calls to each centre, to find out information on the core services and activities on offer. This revealed that:

- Generally, the phone was answered within three rings;
- The knowledge of staff seemed to vary greatly across the centres;
- Very limited cross selling of activities across the centres;
- Most staff did not give information freely and the information sought was only found out from asking questions;
- As no offers are currently available staff seemed to simply offer the cheaper off peak membership, rather than the high priced membership options. (Although it was noted that when we visited the centres, there were August membership offers available).
- Only two out of the ten calls resulted in an invitation to visit the facility;
- None of the staff took contact details during the telephone conversations;
- When requesting information on swimming lessons we were told that there were no spaces and there was no chance of getting on to a course. Only one member of staff gave prices for swimming lessons and referred us to the Facebook page for further information.
- Some of the staff had poor telephone manner and appeared disinterested in the request for information, on one call we were also interrupted whilst the receptionist dealt with other customers.

5.5. I.T and Reporting

5.5.1. It has been evident via this review, from the presentation and level of information provided that there isn't a consistent and uniform approach to data collection and reporting.

5.5.2. This has led to difficulties in accurately assessing performance and benchmarking it with comparable figures. Therefore, it must be difficult for the council to currently monitor performance of each of the centres.

5.5.3. To ensure that the service can be monitored effectively going forward we would recommend that a consistent approach to reporting is implemented across the centres. The Council may also want to consider the use of software such as 'PITCH' to support in the ongoing reporting and benchmarking process.

5.6. Quality Summary

- There is the opportunity to improve the content and information available on the website, including online bookings, this could significantly impact usage and thus income.
- The centres would benefit from a clearly defined marketing and branding strategy.
- There is an opportunity to simplify the membership structure and increase income from direct debit options.
- Reporting needs to be improved for future performance monitoring and benchmarking.
- Further training for staff would improve the level of information available to potential customers and the customer journey from initial contact to visiting the centres.
- Overall the Council needs to consider the customer journey from initial enquiry, whether this is via the website or by telephone, through to visiting the centres from the car parks, through reception, changing rooms and into activity areas. The customer journey needs to be simple, effective and welcoming to encourage users to participate on a regular basis.

6. Financial Performance

6.1. Income Summary

6.1.1. The table below summarises the income across all sites for 2015/16. Total income across the portfolio is £1.8m.

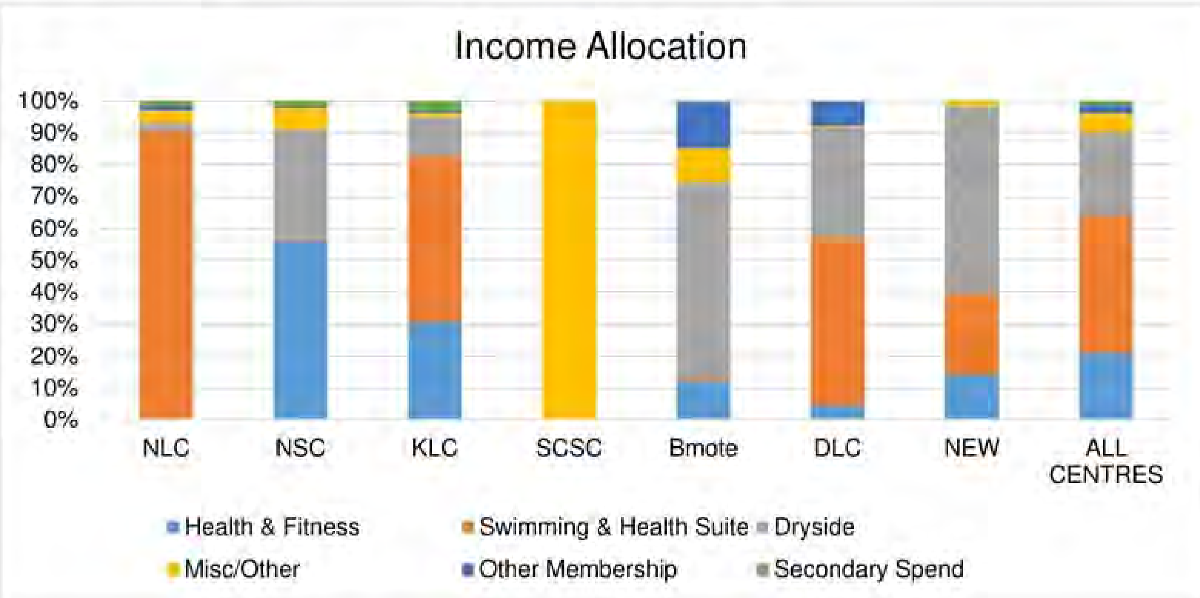
Table 23 - 2015/16 Income Summary

2015/16 INCOME	NLC	NSC	KLC	SCSC	BMOTE	DLC	NEW	ALL CENTRES
Health & Fitness	£0	£252,719	£78,138	£0	£9,096	£16,969	£26,860	£383,781
Swimming & Health Suite	£414,029	£325	£131,704	£0	£944	£195,746	£47,589	£790,336
Dryside	£13,905	£155,064	£31,316	£0	£45,511	£125,948	£111,033	£482,776
Misc/Other	£16,011	£29,365	£3,127	£44,080	£7,929	£1,850	£3,286	£105,649
Other Membership	£7,340	£1,990	£2,008	£0	£10,629	£28,068	£0	£50,035
Secondary Spend	£6,827	£8,024	£7,727	£0	£415	£757	£0	£23,750
TOTAL	**£458,112**	**£447,486**	**£254,020**	**£44,080**	**£74,523**	**£369,337**	**£188,768**	**£1,836,327**

6.1.2. It is important to understand the proportion of income allocated to certain activity areas as any changes to the highest income streams can have a significant impact on overall performance. The graph below outlines the allocation of income across the centre. For wet and dry centres we would typically expect to see health & fitness as the largest income stream followed by swimming.

6.1.3. However, the graph highlights how health and fitness income across the portfolio is the third highest income area behind swimming (43%) and dryside (26%). It is important to note that dryside income includes sports halls, squash, room hire and events.

Figure 20 - Income Allocation



6.1.4. The graph also highlights the minimal secondary spend across the centres, particularly at NLC where there is high swimming income we would expect higher secondary spend. It is however, noted that a new contract for the delivery of vending is currently being procured.

6.2. Income per Visit

6.2.1. We have assessed below the income per visit for the centres in 2015/16.

Figure 21 - Income per Visit

6.2.2. Comparing to 2015 Sport England National benchmarks (no comparable benchmarks are available from Sport NI), wet sites such as NLC have a range of £1.57 - £7.11 per visit. With NLC falling below this at £1.33, we would suggest that a realistic target would be to achieve £3.00 - £4.00 per visit which would place it in the middle of the Sport England benchmark.

6.2.3. For centres in areas with high levels of deprivation the benchmark ranges from £1.08 – £5.96, with the top performing centres achieving over £3.49 per visit. This highlights that there is scope to improve the total income across the centres.

6.2.4. Heavily discounted use, such as the over 60's membership is likely to be contributing towards high usage but low income. As noted in section 5.3, we have not seen the level of discounting of fitness memberships (that include the pools as well) in the local authority centres particularly for the over 60's and the council could review the level of discount, of if it remains unchanged, consider eligibility to be means-tested as opposed to be on age status.

6.3. Health and Fitness

6.3.1. The current size of the gyms is relatively small (with NSC the highest at 60 stations to the smallest at BMOTE with 22 stations). However, NLC and DLC are set to increase to c. 100 station gyms. It is noted in paragraph 3.6.3, that the top 10 private gym operators have on average 115 stations and the top 10 average local authority operators have 61 stations.

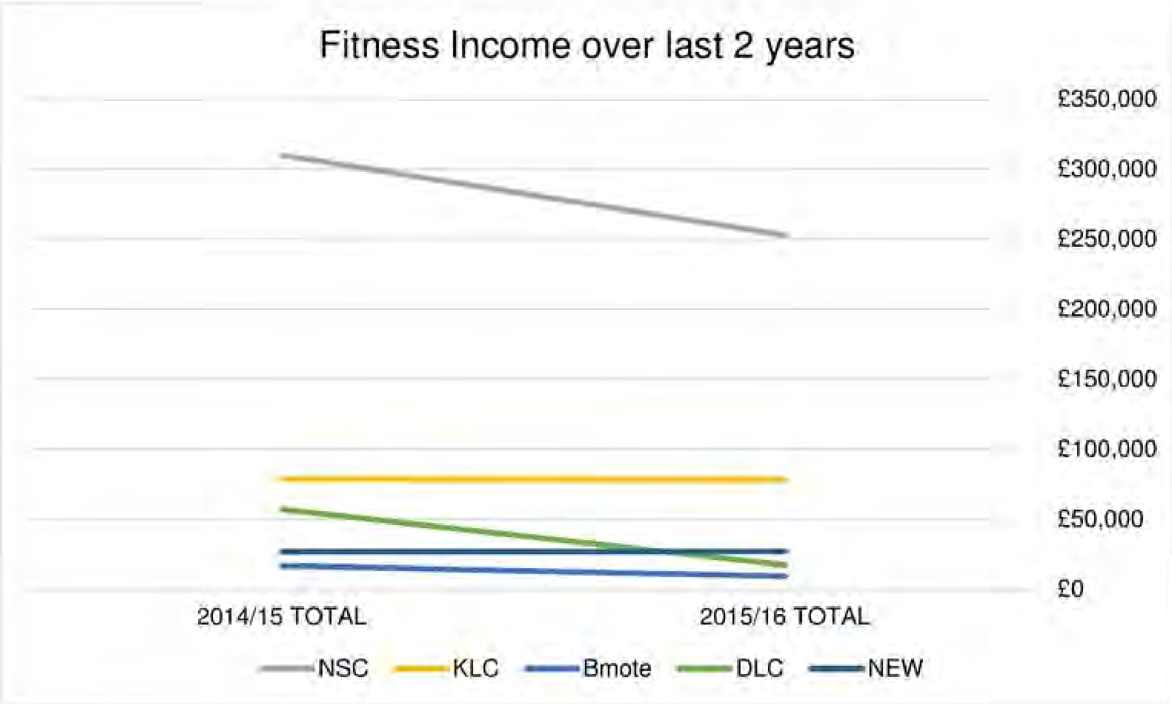
6.3.2. The total number of members at each centre (with access to fitness facilities) is detailed in the table below. In August 2016 the centres had a total of 1,848 fitness members which equates to 1.36% of the 16+ population of Newry, Mourne and Down. Given the lack of substantial competition and overall market penetration rates, we would expect this to be higher.

Table 24 - Fitness Members

	NSC	KLC	BMOTE	DLC	NEW	TOTAL
No. of Fitness Members	1296	370	32	67	83	1,848

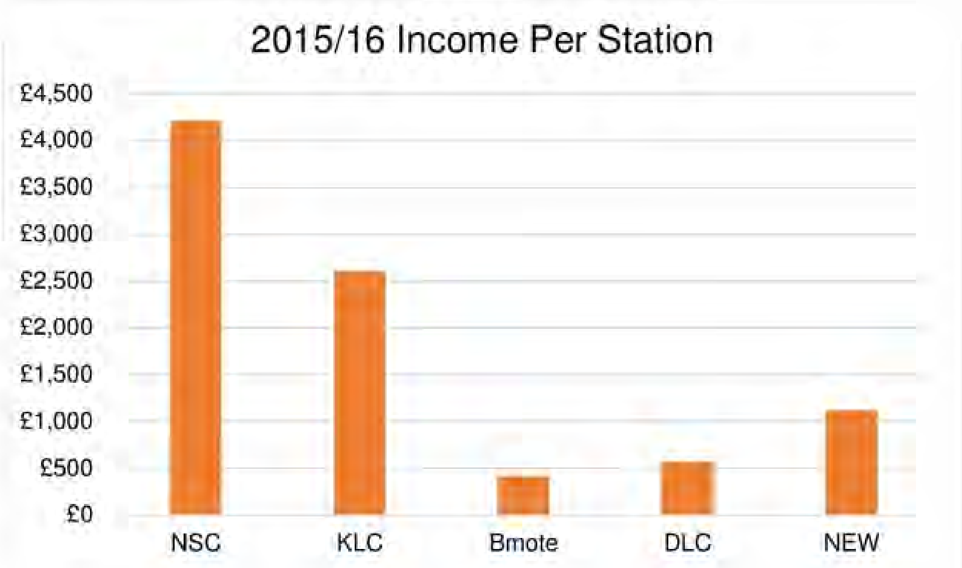
6.3.3. The graph below shows the total income and highlights that across the centres fitness income (codes 1673 and 1675) has remained static or decreased over the last two years.

Figure 22 - Fitness Income 2014-2016



6.3.4. Fitness income per station for 2015/16 has been assessed for all centres and is detailed in the following graph. As an industry guide, a good performing gym, with ancillary facilities, such as a studio and pools, would be expected to achieve on average between £8k - £12k per station. The performance of the centres, as detailed overleaf, is considerably lower than this benchmark.

Figure 23 - Income per Station



6.3.5. Given the assessment of the local area and demographics we believe that the two new centres at NLC and DLC will be able to achieve income per station around £8,000.

6.3.6. The industry standard for members per station is between 20-30, depending of work patterns of members. (Lower for where gym membership has a higher proportion of workers that have traditional hour work days, and higher for those memberships that consist of more non workers or those that work shift patterns).

6.3.7. We have shown in the table below the members per station for the fitness members only and also including the over 60's and less-abled members that have access to the gym within their discounted price. Taking the total members per gym both NSC and KLC are higher than industry standards. However, it has not been possible to determine the level of gym use by the over 60's and less-abled members. AT NSC this potential capacity issue will be alleviated when the new gym opens at NLC.

Table 25 - Members per Station

2015/16	NSC	KLC	BMOTE	DLC	NEW
Members per Station (fitness members)	22	12	1	2	3
Members per Station (including over 60's and less abled members)	59	37	6	8	4

6.3.8. The yield per member is detailed below, note in the calculation of fitness income benchmarks we have excluded the over 60's and less abled membership categories as the income for these options sits outside of the fitness budget. We have also excluded NEW as it does not currently offer direct debit memberships.

6.3.9. Overall the yields appear to be as expected or slightly lower given the pricing structure of the gym, swim, classes memberships (peak prices range from a net value of £20.63 - £24.95).

Table 26 - Membership Yield

2015/16	NSC	KLC	BMOTE	DLC
Membership Yield	£16.25	£17.60	£23.69	£21.11

6.3.10. We have reviewed the breakdown of fitness membership categories and the graphs are detailed in **Appendix 3**. The analysis shows that at DLC, BMOTE, and NEW the most dominant category, at over 50% of the fitness member base, is 'swim/sauna/steam/gym adult pay monthly' priced at £24.95 (£20.79 net). At KLC the most dominant category is the corporate membership option priced at £21.00 per month (£17.50 net). Therefore, the yields achieved at these centres appear reasonable against the net values of the dominant membership categories.

6.3.11. However, at NSC 'gym/swim/classes' at £29.95 (24.95 net) accounts for over 75% of the membership base, however this is not reflected in the yield of £16.25. We would therefore suggest that a detailed review of the membership packages in undertaken supported by a strong sales strategy, to increase the yield at NSC.

6.3.12. It is also worth noting that the centres have 2,663 over 60's members that get use of the gym, pool and health suite for £3.45 per annum. There is also 625 'Less Abled' members paying £11.80 per annum. We understand that income for these categories is included under the code 1602-memberships, which in 2015/16 was £50,035. This results in an average payment per month of £1.57.

6.3.13. Reviewing the current performance along with the latent demand assessment suggests that there is an opportunity to increase fitness income across all centres. We have outlined below what we believe the potential income to be, this is based on the completion of the redevelopments at NLC/NSC and DLC.

Table 27 - Potential Fitness Income

Centre	Latent Demand	Existing Yield	Potential Income	Improved Yield	Potential Income
NLC/NSC	1,106	£16.95	£224,960	£24.00	£318,528
DLC	1,807	£21.11	£457,749	-	-
KLC	375	£17.60	£79,200	-	-
NEW	297	£26.97	£96,121	-	-
TOTAL			**£858,030**		**£951,598**

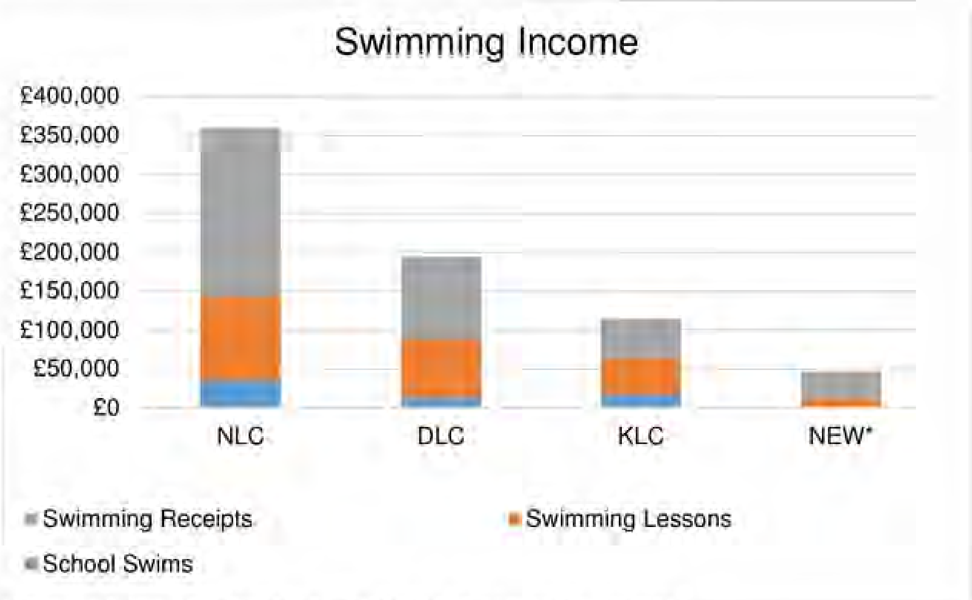
6.3.14. The high volume of membership categories and pricing variations could be reduced and simplified, which would in turn make the sales process easier and would improve yield. We would also suggest that eligibility for the discounted memberships such as the over 60's is reviewed. As previously noted that significantly reduced over 60's and less abled membership prices are unprecedented in other local authorities. At a number of Councils, we are starting to see even tighter restrictions on the over 60's category with some now only offering discounts on a means tested basis, so it is only available to over 60's with low income.

6.3.15. The financial impact this would have on the Councils centres is significant. For example, there is currently 2,663 over 60's members paying £3.45 per annum. If 60% (1,598) of these members could afford to pay and converted to the concessionary rate of £18.55 the additional monthly income would be £27,134 or £325,608 a year.

6.4. Swimming Income

6.4.1. The table below shows total swim income (casual and lessons) for each of the pools in 2015/16. It is evident that casual swimming creates the highest amounts of income for the pools, which is slightly against the national trend that is seeing swimming lessons take over as the highest income stream for swimming pools, (particularly for established trusts managing facilities on behalf of local authorities.)

Figure 24 - Swimming Income

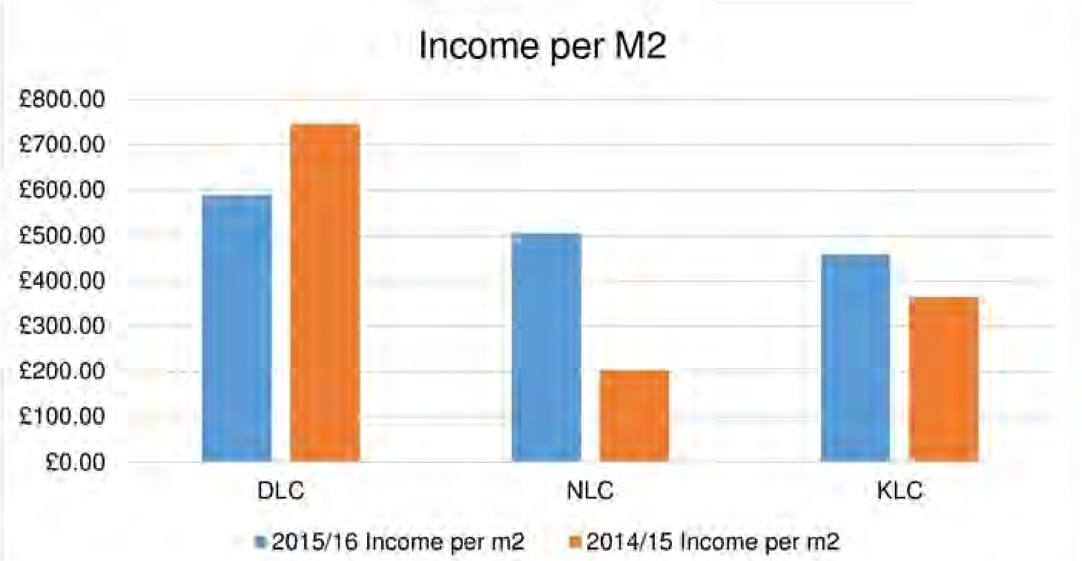


*Income based on 2014/15 – 2015/16 detail not available

6.4.2. As an industry benchmark we would expect swimming pools to achieve income of £500 - £1,000 per m2 of water. In some cases where there is a strong learn to swim or leisure offering income per m2 can achieve higher than this.

6.4.3. The swimming income per m2 for is shown in the graph below, note the total m2 for NEW was not available. It can be seen that all centres are at the lower end of the benchmark, with DLC nearly reaching £600/m2. With the recent investment at NLC the performance is lower than expected and we would have expected this centre to be achieving closer to £800/m2. NLC does have a high number of over 60's and less abled members paying low fees, which may be contributing to the lower than expected casual income. As well as reviewing the pricing, swim lesson income can contribute to increasing these levels as detailed below in 6.4.5 – 6.4.14.

Figure 25 - Swimming Income per m2

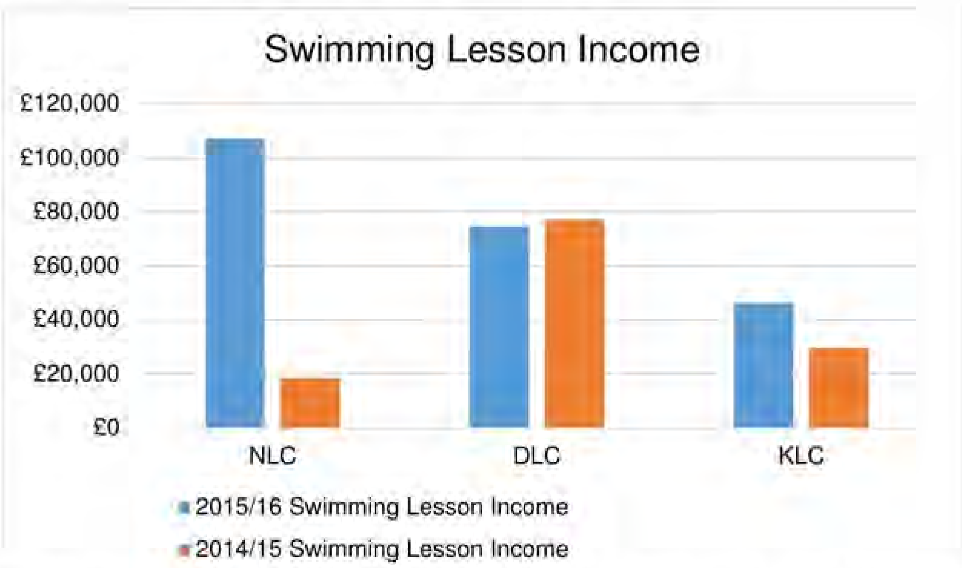


6.4.4. It is also evident that swimming income at DLC has reduced significantly (c. £50k) over the past two years. This may be a result of the price increases that were implemented as well as the facility being old and in need of refurbishment. It is also possible that some customers, especially new customers, may be put off by the building works on site.

6.4.5. Swimming Lesson Income

6.4.6. The graph below illustrates the growth in swimming lesson income over the last two years. NLC has shown considerable growth, which has contributed towards the overall growth of swimming income.

Figure 26 - Swimming Lesson Income



6.4.7. It would be expected that a centre with a main pool and teaching pool would accommodate in the region of 800-1,200 children each week for swimming lessons. For centres with only one pool we would expect there to be a programme with 500-800 children each week, subject to the catchment.

6.4.8. NLC currently has 489 pupils on the swimming lesson scheme and DLC and KLC have 376 and 190 respectively. These are below industry standards, given the lack of competition and knowledge of additional demand we would expect the centres to be able to improve swimming lesson income, however we are aware that it is important to strike a balance as there is know demand for public lane swimming, public recreational swimming along with club and user group bookings. Taking this into consideration, there is potential therefore to review the pool programmes to increase the time available for lessons by reviewing timetables, re=programming club/user group bookings and consider exclusive use of pools for lessons at peak times. For example, a 25m x 4 lane pool can be programmed to cater for up to six lessons at once.

6.4.9. The swimming lesson yield was also reviewed for 2015/16. The yield is calculated by dividing the total swimming lesson income by the total number of children on the scheme and the number of weeks per year (assumed to be 48 for all sites except NEW, for which we have assumed eight weeks).

Table 28 - Swimming Lesson Yield

2015/16	NLC	KLC	DLC	NEW
Swimming Lesson Yield	£4.57	£8.17	£2.56	£3.61

6.4.10. The net price of group swimming lessons is £4.04 NLC is performing slightly above this and NEW slightly below, which does not raise any cause for concern. KLC is significantly the higher, which may be due to a higher number of private lessons, priced at £8.40. DLC has a very low yield at £2.56 and we would suggest that this is reviewed in further detail to assess the reasons for this.

6.4.11. Of the competing facilities that offer swimming lessons prices ranged from £6.00 to £6.40 per lesson, therefore there may be an opportunity to increase pricing as well as introduce direct debit payment options.

6.4.12. Based on the review of current performance, demographics and competition we would expect the centres to be achieving the following levels of income per m2.

Table 29 - Expected Income per m2

Centre	Expected income per m2
NLC	£800-£900
DLC	£800
KLC	£600

6.4.13. In order to achieve the growth we would expect swimming lessons to contribute the following levels of income, based on the known demand. This would take 3 -4 years to achieve.

Table 30 - Potential Swimming Lesson Income

Centre	Swimming lesson additional pupils	Net Price	Potential Income
NLC	450	£4.04	£90,900
DLC	300	£4.04	£60,600
KLC	110	£4.04	£27,720
TOTAL			**£179,220**

6.5. Dryside

6.5.1. Currently the income for all dryside elements, sports halls, squash and room hire is combined within the financial reporting. It has therefore not been possible to produce standard industry benchmarks such as income per court. Total dryside income is detailed below.

Table 31 - Dryside Income

2015/16 Income	NSC	KLC	BMOTE	DLC	NEW
User Payments	£57,725	£10,219	£26,155	£89,097	£27,047
Course Receipts	£43,926	£3,280	£0	£4,359	£74,476
Summer Scheme	£7,629	£0	£0	£11,832	£0
Room Hire	£45,784	£17,817	£19,356	£20,660	£36,557
TOTAL	**£155,064**	**£31,316**	**£45,511**	**£125,948**	**£138,080**

6.5.2. Consequently, we have outlined below the levels of income per court we believe could be achieved at the centres for the sports hall and squash based on the total facility mix, demographics and competition.

6.5.3. We have based our assumptions for NSC and DLC on the new build developments.

6.5.4. At NEW the expected income per court is based on sports and physical activity participation and excludes income from non-sporting bookings and events.

Table 32 - Potential Dryside Income

Centre	Sports Hall Income per Court	Potential Sports Hall income	Squash Income per Court	Potential Squash income
NLC	£20,000	£160,000	£5,000	£10,000
DLC	£20,000	£120,000	£5,000	£10,000
KLC	£15,000	£45,000	£3,500	£3,500
BMOTE	£12,500	£50,000	-	-
NEW	£10,000	£10,000	-	-

6.5.5. It can be seen that total existing dryside income is either in line with or below the expected levels of performance, even though the existing income will also include revenue from meeting room hire and other dryside activities that take place outside of the sports halls and squash courts. This therefore suggests that there is scope to improve the dryside income, this could either be through increased participation or changing the use of these areas to more commercial leisure activities.

6.5.6. The lower than expected income is also supported by the occupancy levels of the sports halls, the detailed occupancy tables are contained in **Appendix 4**, with a summary shown below.

Table 33 - Sports Hall Occupancy

Centre	Sports Hall Occupancy
NSC	25%
DLC	30%
KLC	50%
BMOTE	31%

6.5.7. This level of occupancy is expected to be higher given the Facility Strategy stated that there was a shortfall of badminton courts. Whilst this may be the case based on courts required per 1000 of the population, the review has highlighted that they are not being fully utilised. Consequently, prior to providing additional courts, we would suggest that occupancy is increased within the existing provision. Additionally, if the school sports hall facilities are made available for community use, as suggested in the strategy, then the sports halls within the leisure centres could be considered for alternative leisure use that would increase participation and income, reducing the cost for the Council.

6.5.8. We would expect sports halls to be achieving occupancy levels of 60%-80%. All of the sports halls within the portfolio are currently under-utilised. The Council has a number of ways to increase occupancy and thus participation and income. The first is to further develop programmes particularly in-conjunction with local clubs. It is noted that in recent years, dance, trampolining and gymnastics has grown over traditional sports of basketball and badminton.

6.5.9. Alternatively the space can be re-developed into other facilities to attract new users, particularly younger people. We have recently completed feasibility studies where low occupancy sports hall and squash courts have been re-developed into;

- Clip and climb
- Adventure play
- Indoor Skate
- Boutique 10-pin
- Spa
- Gym and specialist studios (cross fit / functional fitness / hot yoga)

6.5.10. In our experience, these types of facilities offer activities to a younger and new market and generate high levels of usage and income in comparison to the sports hall. Income from a re-developed four court hall can generate in the region of £225k - £275k per annum (subject to further feasibility). There will of course be staff and equipment costs. Please refer to **Appendix 4** for images of these types of facility.

6.5.11. It is noted that in the new build facilities, the number of badminton courts are increasing. At Newry Sports Centre an eight court hall is being built (currently there are six courts) and at Down Patrick, a four court hall is being built, where there are currently three courts and Ballymote is close by with a four court hall.

6.5.12. We believe that there would be considerable opportunities in utilising at least two of the courts at Newry for alternative provision to drive physical activity, for example large adventure play and clip and climb facilities.

6.5.13. At Kilkeel, there is a single squash court on the main corridor towards the gym. This corridor also leads to a meeting room and playgroup. It is believed that this space could be used more effectively by enlarging the fitness suite and replacing the squash court with an adventure play area (taking advantage of the double height area) and extend into the meeting room with party room space. This would complement the outdoor facilities on the promenade.

6.5.14. We have set out the overall income opportunities in the table overleaf.

6.6. Financial Summary

Table 34 – Financial Summary

Income Stream	Summary	Benchmark	Key actions to achieve higher income
Total Income	Income per visit benchmarks for each centre are in the bottom quartile of SENBS. The range for the centres is between 48p - £2.27.	We would expect the smaller centres to achieve over £2.00 per visit with the larger ones and particularly the new centres at NLC and DLC to achieve £3.00-£4.00 per visit.	Develop a clear and consistent sales process and culture to improve data capture and income conversion. Development of a leisure sub brand with a clear and transparent customer journey would assist this process. Training plan developed for all front of house staff to improve the upsell of facilities, services and activities to encourage increased participation and spend. Develop ICT for key stages of the proposed customer journey (from website to retention programmes) and deliver on-going refresher training for staff.
Health and Fitness	Health and fitness income at the centres has either remained static or decreased over the past two years. It would be expected that fitness income was the largest income stream of the centres, however it is either the 2nd or 3rd largest. All of the centres have latent demand and therefore scope to increase the membership base. The table below sets out the total latent demand.	Income per station at all centres is significantly lower than the industry standard of £8k - £12k per station. This is partly due to the high number of over 60's and less abled memberships which are extremely cheap. It is not known however, how many of these members are active users. If they do all use the centres regularly, there could be capacity issues at Newry and Kilkeel. (However the	Pricing Review for all indoor leisure services and consider opportunities for innovative pricing strategies. Simplify membership prices and implement a sales process that aligns with proposed customer journey. (There would be further opportunities if the council wished to review its over 60's per annum charges – ie. To increase (even on a phased approach), to review access entitlements and for example if it

<table>
<tr>
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<table>
<tr><th>Centre</th><th>Latent demand</th><th>Current members (excluding over 60's / less abled)</th><th>Potential additional members</th></tr>
<tr><td>Down LC</td><td>2094</td><td>287</td><td>1,807</td></tr>
<tr><td>Newry LC</td><td>2,402</td><td>1,296</td><td>1,106</td></tr>
<tr><td>Kilkeel</td><td>745</td><td>370</td><td>374</td></tr>
<tr><td>Newcastle</td><td>380</td><td>83</td><td>297</td></tr>
<tr><td>Total</td><td></td><td></td><td>3,584</td></tr>
</table>
The monthly yield per member is set out in the table below.
<table>
<tr><th>2015/16</th><th>NSC</th><th>KLC</th><th>BMOTE</th><th>DLC</th></tr>
<tr><td>Membership Yield</td><td>£16.25</td><td>£17.60</td><td>£23.69</td><td>£21.11</td></tr>
</table>
If the centres could take advantage of the latent demand, we believe additional income could be achieved as per the table below. This is a significant opportunity and would be built up after improvements to websites, the customer journey and simplified pricing structure. It is believed that the growth would be over 3-4 years.
<table>
<tr><th>Centre</th><th>Potential Income</th></tr>
<tr><td>NLC/NSC</td><td>£318,528</td></tr>
<tr><td>DLC</td><td>£457,749</td></tr>
<tr><td>KLC</td><td>£79,200</td></tr>
<tr><td>NEW</td><td>£96,121</td></tr>
<tr><td>TOTAL</td><td>£951,598</td></tr>
</table>
</td>
<td>new gym at Phase 2 Newry will alleviate this but again is unknown at this stage.)</td>
<td>should be during peak/off peak times, to consider means tested application for concession pricing for this category. In addition, There would be further opportunities if the council wished to review its less abled scheme per annum charges.)

Review staff structures and resources to consider and officer dedicated to commercial income, branding and marketing across Indoor Leisure section

Invest in technology to modernise the customer facing offering – eg. website, mobile based apps, join online, class/course online bookings,etc

Invest in gym equipment to modernise centres and offer continuity of services across sites with same equipment supplier allowing for customer integration across the sites and availability of programmes, health assessments and associated technology being identified as a key retention tool

Upgrade / enhance gym in Kilkeel to enhance income opportunities and deal with capacity issues

Consider programming provision – ie. In house where possible to enhance income versus private operation</td>
</tr>
<tr>
<td>Swimming</td>
<td>Swimming income per m2 is lower than expected. With good pool configurations, we would expect NLC and DLC to</td>
<td>Industry standards of £500-£1,000 per m2.</td>
<td>Review programmes to specifically increase swim lesson provision</td>
</tr>
</table>

<table>
<tr>
<td></td>
<td>achieve over £800 per m2.

DLC has seen a large drop in swimming income over the past two years, however overall, the Council by adopting the STA swim delivery model recently has improved continuity and consistency of service to customers

There are opportunities to review the programming to expand the number of pupils that could have lessons. This could result in additional annual income of £179,220 as per the table below.

<table>
<tr><th>Centre</th><th>Swimming lesson additional pupils per week</th><th>Net Price</th><th>Potential Income per annum</th></tr>
<tr><td>NLC</td><td>450</td><td>£4.04</td><td>£90,900</td></tr>
<tr><td>DLC</td><td>300</td><td>£4.04</td><td>£60,600</td></tr>
<tr><td>KLC</td><td>110</td><td>£4.04</td><td>£27,720</td></tr>
<tr><td>TOTAL</td><td></td><td></td><td>£179,220</td></tr>
</table>
</td>
<td></td>
<td>however Council need to consider the balance of swim lessons, lane swimming, public recreational use and club/user group hire to maximise potential additional income opportunities

Consider a review of 1:1 lessons provision to ensure a fully managed and consistent quality programme for customers.

Consider pathways to be established into clubs.</td>
</tr>
<tr>
<td>Dryside</td>
<td>Whilst we have not been able to separate the different dryside income streams from the financials the expected income per court in the sports halls is higher than the current total income achieved.

This is reinforced by the low occupancy levels of the sports halls, which at 25%-50% is considerably lower than the industry norm, however is detailed within the Sports Facility Strategy, eg. There may be opportunities to increase utilisation and therefore income of these spaces by changing their use.</td>
<td>Industry standard occupancy rate of sports halls is 60%-80%.

Income per court of a standard 4-6 court hall is in the region of £15k - £25k per court.</td>
<td>Carry out a pricing review and depending on the local market conditions, opportunities for innovative pricing strategies could be driven through additional staffing resource as highlighted previously, ie. Commercial officer

There is a need to provide additional staffing resource to develop activity programmes with the sports halls via a programming review to increase participant levels, revenue, and coached activities.

We believe there are opportunities at the new Newry Leisure Centre in the future to consider a change of use of</td>
</tr>
</table>

			two of the badminton courts if occupancy and income targets are not met to include physical activity facilities for younger people as well as changing use of the squash court at Kilkeel. This would assist in meeting departmental objectives by increasing activity and will also have a positive impact on reducing low occupancy levels Examples include: clip and climb / adventure play / spa / specialist fitness – hot yoga / functional training / cross fit type facilities.

7. Mature Year - Income Projections

7.1. Based on the service review detailed in the previous sections of the report we have outlined below what we believe the income potential is for the two **new centres at NLC and DLC** in a mature year. This takes into account current performance, demographics, competition and latent demand projections.

7.2. The level of income projected at both centres is in line with the benchmarks detailed in section 6. We believe that with the improved marketing and pricing strategy, supported by a strong management team and customer service these income projections could be achieved at the centres at a mature year position, three years after opening.

7.3. NLC

7.4. We believe the centre has opportunities to increase income, particularly through gym membership and swimming lessons. As a result of the higher throughput we would anticipate a significant growth in secondary spend.

Table 35 - NLC Projected Income for New Centre

Income	Mature Year
Swimming – Casual	£360,000
Swimming – Hire/Schools	£40,000
Swimming – Lessons	£198,000
Gym – Memberships	£570,000
Gym – Casual	£25,000
Studios	£30,000
Sports Hall	£160,000
Squash	£10,000
Secondary Spend	£30,000
Miscellaneous	£45,000
Total	**£1,468,000**

7.5. DLC

7.6. As above, DLC presents an opportunity to grow the membership base and increase swimming lesson income, which will have the most significant impact on overall performance.

Table 36 - DLC Projected Income for New Centre

Income	Mature Year
Swimming – Casual	£240,855
Swimming – Hire/Schools	£20,000
Swimming – Lessons	£135,145
Gym – Memberships	£460,000
Gym – Casual	£20,000
Studios	£22,500
Sports Hall	£120,000
Squash	£10,000
Secondary Spend	£15,000
Miscellaneous	£5,000
Total	**£1,048,500**

7.1. In the table below we have set out the improvements that we believe could be achieved at the other centres reflecting increased participation in fitness, swimming lessons and main hall as discussed in the sections above. This would be achieved over a three-year period.

Table 37. Potential income at other centres

Income (Mature year)	KLC	BMOTE	NEW
Swimming – Casual	50,908	-	34,382
Swimming – Hire/Schools	17,431	-	-
Swimming – Lessons	73,995	482	12,150
Gym – Memberships	157,338	9,096	95,934
Gym – Casual			
Studios			
Sports Hall	37,097	24,356	111,033
Squash			
Secondary Spend	7,727	415	-
Miscellaneous	32,443	45,174	31,390
Total	**376,940**	**79,523**	**284,889**

8. Summary

8.1. The levels of income currently achieved at the centres are lower than expected in most areas, whilst there is an understanding of the demographics and geographical location of the centres, we believe that there is an opportunity to increase throughput and income (supported by the latent demand reports), to bring the performance of the centres in line with industry standards.

8.2. Improved performance can be achieved through a number of actions including but not limited to:

Area	Action
ICT	• Immediate review needed of ICT and the use of modern infrastructure across Indoor Leisure. • Council should be aiming to enhance website offerings and also provide access to online joining, bookings, mobile apps • consistent reporting of income and usage data across the service needed
Marketing and Branding	Leisure Specific Marketing and Branding Strategy needed to achieve a consistent service proposition: • development of a specific indoor leisure Sub brand that includes a clear and transparent journey and offering for the customer • development of a clear and consistent sales process and culture to improve data capture and income conversion • alignment of indoor leisure facility services, procedures and governance • investment in gym equipment to modernise centres and offer continuity of services across sites with same equipment supplier allowing for customer integration across the sites and availability

	of programmes, health assessments and associated technology being identified as a key retention tool • Additional staffing support such as an officer dedicated to commercial income, branding and marketing across Indoor Leisure section.
Pricing	Review of Leisure Pricing Strategy proposed: • Simplification of membership pricing structure • consider opportunities for innovative pricing strategies • consider options regarding over 60's and less abled scheme (price, eligibility and access permissions)
Opportunities for Income Generation	Develop further and implement proposals for opportunities for income generation through facility development and enhancements: • Newcastle • consider Kilkeel Leisure Centre to enhance potential income and potential capacity issues • Consider change of use for sports halls which may have positive impact on participation levels, reducing low occupancy levels and increasing income.
Programming	Consistency of activities needed along with general targeted programming and enhancement of sports development that will assist in increased participation and income levels: • swim lessons (to increase size of current programme) • Group exercise classes (ie. Follow Newry model) • review of coached activities in terms of in house provision versus outsource • consider and develop general targeted programmes that link with corporate objectives • need to provide additional staffing resource to develop activity programmes
Resource	• Appointment of key personnel to maintain direction and delivery of action plan, ie. Leisure Specific Commercial Services Officer.
Linkage and Collaboration	• Closer links with outdoor leisure • Closer links with sports development • Closer links with health and well-being related departments • Above 3 links should increase participation levels and increase targeted programmes
Reporting	• Need for improvements for future performance monitoring and benchmarking that will influence delivery of the business plan action plan.
Training	• Further training for staff would improve the level of information available to potential customers and the customer journey from initial contact to visiting the centres.

8.3. If the above can be implemented then the new centres, DLC and NLC, should be able to achieve income in excess of £1m and £1.4m respectively, bringing them in line with industry standards.

8.4. We have set out in the pages over a structure of an action plan to deliver the improvements as set out above, however, it will be up to the service which areas it wishes to take forward and exactly how the outcomes are delivered and thus the actions required to achieve them.

8.5. The summary income and usage projections for each of the centres taking into account the improvements in the key areas as well as the projection income for the new centres is set out in the tables below:

Note: To ensure that the projections are achievable and realistic, taking into account current performance, competition and other risk factors the projections assume that:

- In a mature year, Newry Leisure Centre and Down Leisure Centre would achieve 70% of the potential projected income identified in section 7 and Kilkeel Leisure Centre
- In a mature year, Ballymote and Newcastle Leisure Centre would achieve 75% the potential projected income identified in section 7
- The income projections don't include proposed optimum swim lesson income growth as a full programming review is recommended to ensure a balance is achieved between extra swim lessons, public demand for lane swimming and recreational swim space along with a review of existing activities to include club/user group and private 1-2-1 use.
- The income projections assume that 50% of proposed optimum hall hire targets will be achieved
- Further review needed on casual usage income projections based on customer throughput

Table 38. Projected centre usage until 2020

Usage	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
NLC (NSC/NSP)	435,401	541,924	555,272	586,316	619,610	652,904	811,050
KLC	162,810	159,161	163,301	196,437	182,838	203,765	203,765
Bmote	NK	42,076	42,076	43,076	43,076	43,076	44,368
DLC	NK	167,668	188,015	192,515	209,862	360,000	432,000
NEW	362,431	389,883	418,395	418,395	418,395	418,395	430,947
Total		**1,300,712**	**1,367,060**	**1,436,739**	**1,473,781**	**1,678,140**	**1,922,131**

Table 39. Projected centre income until 2020

Income	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
NLC (NSC/NSP)	692,769	905,598	907,850	962,433	998,240	1,174,400	1,232,412
KLC	262,442	254,020	254,110	262,512	274,048	301,552	310,598
Bmote	67,728	74,523	74,523	79,523	79,523	79,523	81,113
DLC	407,665	369,337	405,871	423,142	442,068	671,040	861,580
NEW	227,271	188,768	198,380	202,158	213,145	227,911	234,748
Total	**1,657,875**	**1,792,246**	**1,840,733**	**1,929,767**	**2,007,025**	**2,454,426**	**2,720,453**

Action Plan Summary and draft structure

Priority Area	Link to 2020 objective	Action	Sub-actions	Work flows	When	who	Performance measure
Marketing	consistent service proposition across all of our indoor leisure facilities	overarching marketing and branding strategy to link all the elements below					
	consistent service proposition across all of our indoor leisure facilities citizen focused service with improved customer engagement increased number of users and members	branding	develop over-arching brand for health and well-being for service				
			centre brands				
			centre brands – internal guidelines for customer journey areas				
			internal comms and training				
			product brands				
	A single pricing strategy Increased number of users and members Citizen focused service with improved customer engagement	price	review memberships options across all sites	• competition analysis • review industry best practice • consider new structure • assess income impact • assess risks • develop implementation plan			
			fitness memberships				
			swimming lessons memberships				
			pay as you go memberships				
			casual pricing				
			other pricing				

				• go live			
	Improved use of technology consistent service proposition across all of our indoor leisure facilities Citizen focused service with improved customer engagement Increased number of users and members Modern infrastructure across the estate	comms	website	• complete review and re-design of services websites • on-line bookings • on-line payment • contact details collection • link to branding development			
			social media	• develop social media strategy • implement action plan • have centre champions			
			front of house	• standards of consistent messages			
			customer journey	• look and feel around the centres / customer journey consistent with branding styles and guidelines			

	consistent service proposition across all of our indoor leisure facilities Increased number of users and members	promotions	core central	• annual calendar developed based on increasing participation and income • each centre develops own detailed promotions plan			
			product based				
			target based				
			centre specific				
Operations	consistent service proposition across all of our indoor leisure facilities Increased variety of programmes available Citizen focused service with improved customer engagement	product development	fitness - gym	• clearly define core products • retention programmes • first 30 days etc • pool programme review • lesson structure and delivery reviewed • review business case to deliver services in-house (group exercise / 1:1 lessons)			
			fitness – group exercise				
			swimming lessons				
			sports and sessions				

	consistent service proposition across all of our indoor leisure facilities Modern infrastructure across the estate	operating standards	Standards set out for each product	• all procedures to reflect product review • all staff training and coached			
ICT	Improved use of technology consistent service proposition across all of our indoor leisure facilities Increased number of users and members Citizen focused service with improved customer engagement Modern infrastructure across the estate	front of house	pricing and codes aligned on FOH system to allow usage and income comparisons between centres				
		bookings	consistence approach to bookings	• development of on-line booking capability for sessions and courses			
		web site	Functionality improved to improve agility	• updates to be made locally • link to on-line booking functionality			
		accounts systems	aligned, so the same for all centres	• supports easy performance review and monitoring			
			codes set up to reflect facility areas				

Staff	consistent service proposition across all of our indoor leisure facilities Citizen focused service with improved customer engagement	roles and responsibilities	roles reviewed to reflect new branding and product requirements	• senior manager responsible for business development • clear who has the sales roles on sites (FOH or customer advisors)			
		training	training in new branding and products				
			specific sales training for relevant staff				
Facility Investment	Increased number of users and members Increased variety of programmes available Modern infrastructure across the estate	change of use	consider long list of options for low utilisation spaces (sports hall and squash courts)	• competition analysis • Business plan – revenue impact • Capital costs • Potential funding and pay back			
		feasibility					
Monito ring and	Increased number of users and members	Income	set out total income and facility area targets for each centre	• Set growth over 4-year plan • Linked to potential new fitness members			
	Improved use of	Users	set out total increased user targets (unique				

	technology Citizen focused service with improved customer engagement		users) Set out targets for low usage and target groups	per site • Assign weekly new sales targets to sites • Set out retention targets for sites • Linked to potential new swimming lesson pupils per centre • Linked to any new pricing policy • Programme review • Facility enhancements • Ensure FOH / IT systems can easily record and monitor members / length of membership • On site measure members and users length of stay / facilities accessed			
		total visits	set out total increase in total visits targets for facility areas and centres				

APPENDIX 1 – MOSAIC REPORTS

MOSAIC UK Profile Report

Target Area: 15 minute drive time around {New} Newry Leisure Centre *(Newry, Mourne & Down)*

Base Area: Northern Ireland

	Newry LC - 15 minutes	Newry LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
Groups						
A Alpha Territory (Pop)	324	0.57	19,353	1.03	1.67	56
B Professional Rewards (Pop)	4,932	8.75	188,260	10.06	2.62	87
C Rural Solitude (Pop)	4,636	8.22	204,076	10.90	2.27	75
D Small Town Diversity (Pop)	8,562	15.19	255,872	13.67	3.35	111
E Active Retirement (Pop)	200	0.35	32,747	1.75	0.61	20
F Suburban Mindsets (Pop)	8,876	15.75	209,243	11.18	4.24	141
G Careers and Kids (Pop)	6,560	11.64	173,539	9.27	3.78	126
H New Homemakers (Pop)	1,458	2.59	70,308	3.76	2.07	69
I Ex-Council Community (Pop)	9,609	17.05	191,690	10.24	5.01	166
J Claimant Cultures (Pop)	4,810	8.53	201,195	10.75	2.39	79
K Upper Floor Living (Pop)	533	0.95	39,594	2.12	1.35	45
L Elderly Needs (Pop)	1,366	2.42	74,139	3.96	1.84	61
M Industrial Heritage (Pop)	2,129	3.78	97,156	5.19	2.19	73
N Terraced Melting Pot (Pop)	1,969	3.49	65,272	3.49	3.02	100
O Liberal Opinions (Pop)	357	0.63	42,018	2.24	0.85	28
Population estimate 2014	56,373	100.00	1,871,879	100.00	3.01	100

	Newry LC - 15 minutes	Newry LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
A Alpha Territory (Pop)						
A01 Global Power Brokers (Pop)	0	0.00	0	0.00	N/A	N/A
A02 Voices of Authority (Pop)	132	0.23	6,306	0.34	2.09	70
A03 Business Class (Pop)	192	0.34	10,634	0.57	1.81	60
A04 Serious Money (Pop)	0	0.00	2,413	0.13	0.00	0
Population estimate 2014	56,373	100.00	1,871,879	100.00	3.01	100

	Newry LC - 15 minutes	Newry LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
B Professional Rewards (Pop)						
B05 Mid-Career Climbers (Pop)	2,795	4.96	83,785	4.48	3.34	111
B06 Yesterday's Captains (Pop)	152	0.27	26,380	1.41	0.58	19
B07 Distinctive Success (Pop)	39	0.07	2,696	0.14	1.43	48
B08 Dormitory Villagers (Pop)	661	1.17	25,974	1.39	2.55	85

B09 Escape to the Country (Pop)	1,213	2.15	39,132	2.09	3.10	103
B10 Parish Guardians (Pop)	72	0.13	10,293	0.55	0.70	23
Population estimate 2014	56,373	100.00	1,871,879	100.00	3.01	100

	Newry LC - 15 minutes	Newry LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
C Rural Solitude (Pop)						
C11 Squires Among Locals (Pop)	50	0.09	6,668	0.36	0.75	25
C12 Country Loving Elders (Pop)	209	0.37	17,875	0.95	1.17	39
C13 Modern Agribusiness (Pop)	3,469	6.15	139,460	7.45	2.49	83
C14 Farming Today (Pop)	786	1.39	28,040	1.50	2.80	93
C15 Upland Struggle (Pop)	122	0.22	12,033	0.64	1.01	34
Population estimate 2014	56,373	100.00	1,871,879	100.00	3.01	100

	Newry LC - 15 minutes	Newry LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
D Small Town Diversity (Pop)						
D16 Side Street Singles (Pop)	697	1.24	14,241	0.76	4.89	162
D17 Jacks of All Trades (Pop)	2,538	4.50	65,955	3.52	3.85	128
D18 Hardworking Families (Pop)	2,248	3.99	77,033	4.12	2.92	97
D19 Innate Conservatives (Pop)	3,079	5.46	98,643	5.27	3.12	104
Population estimate 2014	56,373	100.00	1,871,879	100.00	3.01	100

	Newry LC - 15 minutes	Newry LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
E Active Retirement (Pop)						
E20 Golden Retirement (Pop)	0	0.00	1,903	0.10	0.00	0
E21 Bungalow Quietude (Pop)	88	0.16	19,798	1.06	0.45	15
E22 Beachcombers (Pop)	6	0.01	3,247	0.17	0.18	6
E23 Balcony Downsizers (Pop)	106	0.19	7,799	0.42	1.36	45
Population estimate 2014	56,373	100.00	1,871,879	100.00	3.01	100

	Newry LC - 15 minutes	Newry LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
F Suburban Mindsets (Pop)						
F24 Garden Suburbia (Pop)	2,889	5.13	31,858	1.70	9.07	301
F25 Production Managers (Pop)	275	0.49	35,484	1.90	0.78	26
F26 Mid-Market Families (Pop)	3,441	6.10	64,975	3.47	5.30	176
F27 Shop Floor Affluence (Pop)	2,095	3.72	70,627	3.77	2.97	98
F28 Asian Attainment (Pop)	176	0.31	6,299	0.34	2.80	93
Population estimate 2014	56,373	100.00	1,871,879	100.00	3.01	100

	Newry LC - 15 minutes	Newry LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
G Careers and Kids (Pop)						
G29 Footloose Managers (Pop)	94	0.17	13,740	0.73	0.68	23
G30 Soccer Dads and Mums (Pop)	1,469	2.61	39,719	2.12	3.70	123

G31 Domestic Comfort (Pop)	2,254	4.00	51,482	2.75	4.38	145
G32 Childcare Years (Pop)	2,742	4.86	66,909	3.57	4.10	136
G33 Military Dependants (Pop)	0	0.00	1,689	0.09	0.00	0
Population estimate 2014	56,373	100.00	1,871,879	100.00	3.01	100
	Newry LC - 15 minutes	**Newry LC - 15 minutes %**	**Northern Ireland**	**Northern Ireland %**	**Penetration**	**Index**
H New Homemakers (Pop)						
H34 Buy-to-Let Territory (Pop)	0	0.00	4,061	0.22	0.00	0
H35 Brownfield Pioneers (Pop)	1,289	2.29	52,490	2.80	2.46	82
H36 Foot on the Ladder (Pop)	134	0.24	9,799	0.52	1.37	45
H37 First to Move In (Pop)	35	0.06	3,958	0.21	0.88	29
Population estimate 2014	56,373	100.00	1,871,879	100.00	3.01	100
	Newry LC - 15 minutes	**Newry LC - 15 minutes %**	**Northern Ireland**	**Northern Ireland %**	**Penetration**	**Index**
I Ex-Council Community (Pop)						
I38 Settled Ex-Tenants (Pop)	2,800	4.97	65,214	3.48	4.29	143
I39 Choice Right to Buy (Pop)	2,018	3.58	52,102	2.78	3.87	129
I40 Legacy of Labour (Pop)	2,001	3.55	41,424	2.21	4.83	160
I41 Stressed Borrowers (Pop)	2,790	4.95	32,950	1.76	8.47	281
Population estimate 2014	56,373	100.00	1,871,879	100.00	3.01	100
	Newry LC - 15 minutes	**Newry LC - 15 minutes %**	**Northern Ireland**	**Northern Ireland %**	**Penetration**	**Index**
J Claimant Cultures (Pop)						
J42 Worn-Out Workers (Pop)	3,410	6.05	141,372	7.55	2.41	80
J43 Streetwise Kids (Pop)	1,149	2.04	44,282	2.37	2.60	86
J44 New Parents in Need (Pop)	251	0.45	15,541	0.83	1.62	54
Population estimate 2014	56,373	100.00	1,871,879	100.00	3.01	100
	Newry LC - 15 minutes	**Newry LC - 15 minutes %**	**Northern Ireland**	**Northern Ireland %**	**Penetration**	**Index**
K Upper Floor Living (Pop)						
K45 Small Block Singles (Pop)	319	0.57	26,552	1.42	1.20	40
K46 Tenement Living (Pop)	214	0.38	12,087	0.65	1.77	59
K47 Deprived View (Pop)	0	0.00	955	0.05	0.00	0
K48 Multicultural Towers (Pop)	0	0.00	0	0.00	N/A	N/A
K49 Re-Housed Migrants (Pop)	0	0.00	0	0.00	N/A	N/A
Population estimate 2014	56,373	100.00	1,871,879	100.00	3.01	100
	Newry LC - 15 minutes	**Newry LC - 15 minutes %**	**Northern Ireland**	**Northern Ireland %**	**Penetration**	**Index**
L Elderly Needs (Pop)						
L50 Pensioners in Blocks (Pop)	683	1.21	25,503	1.36	2.68	89
L51 Sheltered Seniors (Pop)	77	0.14	10,330	0.55	0.75	25
L52 Meals on Wheels (Pop)	90	0.16	2,801	0.15	3.21	107

L53 Low Spending Elders (Pop)	516	0.92	35,505	1.90	1.45	48
Population estimate 2014	56,373	100.00	1,871,879	100.00	3.01	100
	Newry LC - 15 minutes	**Newry LC - 15 minutes %**	**Northern Ireland**	**Northern Ireland %**	**Penetration**	**Index**
M Industrial Heritage (Pop)						
M54 Clocking Off (Pop)	719	1.28	39,786	2.13	1.81	60
M55 Backyard Regeneration (Pop)	469	0.83	21,868	1.17	2.15	71
M56 Small Wage Owners (Pop)	941	1.67	35,502	1.90	2.65	88
Population estimate 2014	56,373	100.00	1,871,879	100.00	3.01	100
	Newry LC - 15 minutes	**Newry LC - 15 minutes %**	**Northern Ireland**	**Northern Ireland %**	**Penetration**	**Index**
N Terraced Melting Pot (Pop)						
N57 Back-to-Back Basics (Pop)	531	0.94	25,791	1.38	2.06	68
N58 Asian Identities (Pop)	0	0.00	2,387	0.13	0.00	0
N59 Low-Key Starters (Pop)	1,438	2.55	34,947	1.87	4.11	137
N60 Global Fusion (Pop)	0	0.00	2,147	0.11	0.00	0
Population estimate 2014	56,373	100.00	1,871,879	100.00	3.01	100
	Newry LC - 15 minutes	**Newry LC - 15 minutes %**	**Northern Ireland**	**Northern Ireland %**	**Penetration**	**Index**
O Liberal Opinions (Pop)						
O61 Convivial Homeowners (Pop)	0	0.00	4,423	0.24	0.00	0
O62 Crash Pad Professionals (Pop)	0	0.00	5,116	0.27	0.00	0
O63 Urban Cool (Pop)	0	0.00	0	0.00	N/A	N/A
O64 Bright Young Things (Pop)	0	0.00	766	0.04	0.00	0
O65 Anti-Materialists (Pop)	357	0.63	12,969	0.69	2.75	91
O66 University Fringe (Pop)	0	0.00	11,172	0.60	0.00	0
O67 Study Buddies (Pop)	0	0.00	7,572	0.40	0.00	0
Population estimate 2014	56,373	100.00	1,871,879	100.00	3.01	100

MOSAIC UK Profile Report

Target Area: 15 minute drive time around {New} Downpatrick Leisure Centre *(Newry, Mourne & Down)*

Base Area: Northern Ireland

	Downpatrick LC - 15 minutes	Downpatrick LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
Groups						
A Alpha Territory (Pop)	0	0.00	19,353	1.03	0.00	0
B Professional Rewards (Pop)	5,642	14.91	188,260	10.06	3.00	148
C Rural Solitude (Pop)	3,956	10.46	204,076	10.90	1.94	96
D Small Town Diversity (Pop)	7,258	19.18	255,872	13.67	2.84	140
E Active Retirement (Pop)	222	0.59	32,747	1.75	0.68	34
F Suburban Mindsets (Pop)	3,068	8.11	209,243	11.18	1.47	73
G Careers and Kids (Pop)	3,231	8.54	173,539	9.27	1.86	92
H New Homemakers (Pop)	1,083	2.86	70,308	3.76	1.54	76
I Ex-Council Community (Pop)	6,242	16.50	191,690	10.24	3.26	161
J Claimant Cultures (Pop)	3,577	9.45	201,195	10.75	1.78	88
K Upper Floor Living (Pop)	367	0.97	39,594	2.12	0.93	46
L Elderly Needs (Pop)	1,062	2.81	74,139	3.96	1.43	71
M Industrial Heritage (Pop)	1,044	2.76	97,156	5.19	1.08	53
N Terraced Melting Pot (Pop)	818	2.16	65,272	3.49	1.25	62
O Liberal Opinions (Pop)	22	0.06	42,018	2.24	0.05	3
Population estimate 2014	37,834	100.00	1,871,879	100.00	2.02	100

	Downpatrick LC - 15 minutes	Downpatrick LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
A Alpha Territory (Pop)						
A01 Global Power Brokers (Pop)	0	0.00	0	0.00	N/A	N/A
A02 Voices of Authority (Pop)	0	0.00	6,306	0.34	0.00	0
A03 Business Class (Pop)	0	0.00	10,634	0.57	0.00	0
A04 Serious Money (Pop)	0	0.00	2,413	0.13	0.00	0
Population estimate 2014	37,834	100.00	1,871,879	100.00	2.02	100

	Downpatrick LC - 15 minutes	Downpatrick LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
B Professional Rewards (Pop)						
B05 Mid-Career Climbers (Pop)	2,847	7.53	83,785	4.48	3.40	168
B06 Yesterday's Captains (Pop)	238	0.63	26,380	1.41	0.90	45
B07 Distinctive Success (Pop)	24	0.06	2,696	0.14	0.89	44
B08 Dormitory Villagers (Pop)	805	2.13	25,974	1.39	3.10	153
B09 Escape to the Country (Pop)	1,473	3.89	39,132	2.09	3.77	186
B10 Parish Guardians (Pop)	255	0.67	10,293	0.55	2.48	122
Population estimate 2014	37,834	100.00	1,871,879	100.00	2.02	100

	Downpatrick LC - 15 minutes	Downpatrick LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
C Rural Solitude (Pop)						
C11 Squires Among Locals (Pop)	143	0.38	6,668	0.36	2.15	106
C12 Country Loving Elders (Pop)	565	1.49	17,875	0.95	3.16	156
C13 Modern Agribusiness (Pop)	3,199	8.46	139,460	7.45	2.29	114
C14 Farming Today (Pop)	49	0.13	28,040	1.50	0.17	9
C15 Upland Struggle (Pop)	0	0.00	12,033	0.64	0.00	0
Population estimate 2014	37,834	100.00	1,871,879	100.00	2.02	100

	Downpatrick LC - 15 minutes	Downpatrick LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
D Small Town Diversity (Pop)						
D16 Side Street Singles (Pop)	308	0.82	14,241	0.76	2.17	107
D17 Jacks of All Trades (Pop)	1,326	3.50	65,955	3.52	2.01	99
D18 Hardworking Families (Pop)	2,465	6.52	77,033	4.12	3.20	158
D19 Innate Conservatives (Pop)	3,158	8.35	98,643	5.27	3.20	158
Population estimate 2014	37,834	100.00	1,871,879	100.00	2.02	100

	Downpatrick LC - 15 minutes	Downpatrick LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
E Active Retirement (Pop)						
E20 Golden Retirement (Pop)	25	0.07	1,903	0.10	1.34	66
E21 Bungalow Quietude (Pop)	184	0.49	19,798	1.06	0.93	46
E22 Beachcombers (Pop)	0	0.00	3,247	0.17	0.00	0
E23 Balcony Downsizers (Pop)	13	0.03	7,799	0.42	0.17	8
Population estimate 2014	37,834	100.00	1,871,879	100.00	2.02	100

	Downpatrick LC - 15 minutes	Downpatrick LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
F Suburban Mindsets (Pop)						
F24 Garden Suburbia (Pop)	603	1.59	31,858	1.70	1.89	94
F25 Production Managers (Pop)	48	0.13	35,484	1.90	0.14	7
F26 Mid-Market Families (Pop)	1,032	2.73	64,975	3.47	1.59	79
F27 Shop Floor Affluence (Pop)	1,344	3.55	70,627	3.77	1.90	94
F28 Asian Attainment (Pop)	41	0.11	6,299	0.34	0.66	32
Population estimate 2014	37,834	100.00	1,871,879	100.00	2.02	100

	Downpatrick LC - 15 minutes	Downpatrick LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
G Careers and Kids (Pop)						
G29 Footloose Managers (Pop)	268	0.71	13,740	0.73	1.95	97
G30 Soccer Dads and Mums (Pop)	357	0.94	39,719	2.12	0.90	44
G31 Domestic Comfort (Pop)	905	2.39	51,482	2.75	1.76	87
G32 Childcare Years (Pop)	1,570	4.15	66,909	3.57	2.35	116
G33 Military Dependants (Pop)	131	0.35	1,689	0.09	7.77	384
Population estimate 2014	37,834	100.00	1,871,879	100.00	2.02	100

	Downpatrick LC - 15 minutes	Downpatrick LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
H New Homemakers (Pop)						
H34 Buy-to-Let Territory (Pop)	0	0.00	4,061	0.22	0.00	0
H35 Brownfield Pioneers (Pop)	791	2.09	52,490	2.80	1.51	75
H36 Foot on the Ladder (Pop)	149	0.39	9,799	0.52	1.52	75
H37 First to Move In (Pop)	143	0.38	3,958	0.21	3.61	178
Population estimate 2014	37,834	100.00	1,871,879	100.00	2.02	100
	Downpatrick LC - 15 minutes	Downpatrick LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
I Ex-Council Community (Pop)						
I38 Settled Ex-Tenants (Pop)	2,326	6.15	65,214	3.48	3.57	176
I39 Choice Right to Buy (Pop)	2,233	5.90	52,102	2.78	4.29	212
I40 Legacy of Labour (Pop)	458	1.21	41,424	2.21	1.11	55
I41 Stressed Borrowers (Pop)	1,225	3.24	32,950	1.76	3.72	184
Population estimate 2014	37,834	100.00	1,871,879	100.00	2.02	100
	Downpatrick LC - 15 minutes	Downpatrick LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
J Claimant Cultures (Pop)						
J42 Worn-Out Workers (Pop)	1,946	5.14	141,372	7.55	1.38	68
J43 Streetwise Kids (Pop)	1,394	3.68	44,282	2.37	3.15	156
J44 New Parents in Need (Pop)	237	0.63	15,541	0.83	1.52	75
Population estimate 2014	37,834	100.00	1,871,879	100.00	2.02	100
	Downpatrick LC - 15 minutes	Downpatrick LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
K Upper Floor Living (Pop)						
K45 Small Block Singles (Pop)	239	0.63	26,552	1.42	0.90	45
K46 Tenement Living (Pop)	128	0.34	12,087	0.65	1.06	52
K47 Deprived View (Pop)	0	0.00	955	0.05	0.00	0
K48 Multicultural Towers (Pop)	0	0.00	0	0.00	N/A	N/A
K49 Re-Housed Migrants (Pop)	0	0.00	0	0.00	N/A	N/A
Population estimate 2014	37,834	100.00	1,871,879	100.00	2.02	100
	Downpatrick LC - 15 minutes	Downpatrick LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
L Elderly Needs (Pop)						
L50 Pensioners in Blocks (Pop)	94	0.25	25,503	1.36	0.37	18
L51 Sheltered Seniors (Pop)	93	0.25	10,330	0.55	0.90	45
L52 Meals on Wheels (Pop)	0	0.00	2,801	0.15	0.00	0
L53 Low Spending Elders (Pop)	875	2.31	35,505	1.90	2.47	122
Population estimate 2014	37,834	100.00	1,871,879	100.00	2.02	100
	Downpatrick LC - 15 minutes	Downpatrick LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
M Industrial Heritage (Pop)						
M54 Clocking Off (Pop)	300	0.79	39,786	2.13	0.76	37

M55 Backyard Regeneration (Pop)	564	1.49	21,868	1.17	2.58	128
M56 Small Wage Owners (Pop)	180	0.48	35,502	1.90	0.51	25
Population estimate 2014	37,834	100.00	1,871,879	100.00	2.02	100
	Downpatrick LC - 15 minutes	**Downpatrick LC - 15 minutes %**	**Northern Ireland**	**Northern Ireland %**	**Penetration**	**Index**
N Terraced Melting Pot (Pop)						
N57 Back-to-Back Basics (Pop)	419	1.11	25,791	1.38	1.62	80
N58 Asian Identities (Pop)	0	0.00	2,387	0.13	0.00	0
N59 Low-Key Starters (Pop)	399	1.06	34,947	1.87	1.14	57
N60 Global Fusion (Pop)	0	0.00	2,147	0.11	0.00	0
Population estimate 2014	37,834	100.00	1,871,879	100.00	2.02	100
	Downpatrick LC - 15 minutes	**Downpatrick LC - 15 minutes %**	**Northern Ireland**	**Northern Ireland %**	**Penetration**	**Index**
O Liberal Opinions (Pop)						
O61 Convivial Homeowners (Pop)	0	0.00	4,423	0.24	0.00	0
O62 Crash Pad Professionals (Pop)	0	0.00	5,116	0.27	0.00	0
O63 Urban Cool (Pop)	0	0.00	0	0.00	N/A	N/A
O64 Bright Young Things (Pop)	0	0.00	766	0.04	0.00	0
O65 Anti-Materialists (Pop)	0	0.00	12,969	0.69	0.00	0
O66 University Fringe (Pop)	22	0.06	11,172	0.60	0.19	10
O67 Study Buddies (Pop)	0	0.00	7,572	0.40	0.00	0
Population estimate 2014	37,834	100.00	1,871,879	100.00	2.02	100

MOSAIC UK Profile Report

Target Area: 15 minute drive time around Kilkeel Leisure Centre *(Newry, Mourne & Down)*

Base Area: Northern Ireland

	Kilkeel LC - 15 minutes	Kilkeel LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
Groups						
A Alpha Territory (Pop)	0	0.00	19,353	1.03	0.00	0
B Professional Rewards (Pop)	992	7.02	188,260	10.06	0.53	70
C Rural Solitude (Pop)	4,060	28.72	204,076	10.90	1.99	263
D Small Town Diversity (Pop)	3,671	25.97	255,872	13.67	1.43	190
E Active Retirement (Pop)	56	0.40	32,747	1.75	0.17	23
F Suburban Mindsets (Pop)	1,058	7.48	209,243	11.18	0.51	67
G Careers and Kids (Pop)	420	2.97	173,539	9.27	0.24	32
H New Homemakers (Pop)	665	4.70	70,308	3.76	0.95	125
I Ex-Council Community (Pop)	1,850	13.09	191,690	10.24	0.97	128
J Claimant Cultures (Pop)	549	3.88	201,195	10.75	0.27	36
K Upper Floor Living (Pop)	0	0.00	39,594	2.12	0.00	0
L Elderly Needs (Pop)	198	1.40	74,139	3.96	0.27	35
M Industrial Heritage (Pop)	483	3.42	97,156	5.19	0.50	66
N Terraced Melting Pot (Pop)	134	0.95	65,272	3.49	0.21	27
O Liberal Opinions (Pop)	0	0.00	42,018	2.24	0.00	0
Population estimate 2014	14,136	100.00	1,871,879	100.00	0.76	100

	Kilkeel LC - 15 minutes	Kilkeel LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
A Alpha Territory (Pop)						
A01 Global Power Brokers (Pop)	0	0.00	0	0.00	N/A	N/A
A02 Voices of Authority (Pop)	0	0.00	6,306	0.34	0.00	0
A03 Business Class (Pop)	0	0.00	10,634	0.57	0.00	0
A04 Serious Money (Pop)	0	0.00	2,413	0.13	0.00	0
Population estimate 2014	14,136	100.00	1,871,879	100.00	0.76	100

	Kilkeel LC - 15 minutes	Kilkeel LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
B Professional Rewards (Pop)						
B05 Mid-Career Climbers (Pop)	168	1.19	83,785	4.48	0.20	27
B06 Yesterday's Captains (Pop)	0	0.00	26,380	1.41	0.00	0
B07 Distinctive Success (Pop)	7	0.05	2,696	0.14	0.26	35
B08 Dormitory Villagers (Pop)	207	1.46	25,974	1.39	0.80	105
B09 Escape to the Country (Pop)	580	4.10	39,132	2.09	1.48	196
B10 Parish Guardians (Pop)	30	0.21	10,293	0.55	0.29	39
Population estimate 2014	14,136	100.00	1,871,879	100.00	0.76	100

	Kilkeel LC - 15 minutes	Kilkeel LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
C Rural Solitude (Pop)						
C11 Squires Among Locals (Pop)	51	0.36	6,668	0.36	0.76	101
C12 Country Loving Elders (Pop)	669	4.73	17,875	0.95	3.74	496
C13 Modern Agribusiness (Pop)	3,043	21.52	139,460	7.45	2.18	289
C14 Farming Today (Pop)	297	2.10	28,040	1.50	1.06	140
C15 Upland Struggle (Pop)	0	0.00	12,033	0.64	0.00	0
Population estimate 2014	14,136	100.00	1,871,879	100.00	0.76	100

	Kilkeel LC - 15 minutes	Kilkeel LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
D Small Town Diversity (Pop)						
D16 Side Street Singles (Pop)	156	1.10	14,241	0.76	1.10	145
D17 Jacks of All Trades (Pop)	1,399	9.90	65,955	3.52	2.12	281
D18 Hardworking Families (Pop)	804	5.69	77,033	4.12	1.04	138
D19 Innate Conservatives (Pop)	1,312	9.28	98,643	5.27	1.33	176
Population estimate 2014	14,136	100.00	1,871,879	100.00	0.76	100

	Kilkeel LC - 15 minutes	Kilkeel LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
E Active Retirement (Pop)						
E20 Golden Retirement (Pop)	0	0.00	1,903	0.10	0.00	0
E21 Bungalow Quietude (Pop)	56	0.40	19,798	1.06	0.28	38
E22 Beachcombers (Pop)	0	0.00	3,247	0.17	0.00	0
E23 Balcony Downsizers (Pop)	0	0.00	7,799	0.42	0.00	0
Population estimate 2014	14,136	100.00	1,871,879	100.00	0.76	100

	Kilkeel LC - 15 minutes	Kilkeel LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
F Suburban Mindsets (Pop)						
F24 Garden Suburbia (Pop)	0	0.00	31,858	1.70	0.00	0
F25 Production Managers (Pop)	0	0.00	35,484	1.90	0.00	0
F26 Mid-Market Families (Pop)	399	2.82	64,975	3.47	0.61	81
F27 Shop Floor Affluence (Pop)	658	4.66	70,627	3.77	0.93	123
F28 Asian Attainment (Pop)	0	0.00	6,299	0.34	0.00	0
Population estimate 2014	14,136	100.00	1,871,879	100.00	0.76	100

	Kilkeel LC - 15 minutes	Kilkeel LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
G Careers and Kids (Pop)						
G29 Footloose Managers (Pop)	4	0.03	13,740	0.73	0.03	4
G30 Soccer Dads and Mums (Pop)	66	0.47	39,719	2.12	0.17	22
G31 Domestic Comfort (Pop)	0	0.00	51,482	2.75	0.00	0
G32 Childcare Years (Pop)	351	2.48	66,909	3.57	0.52	69
G33 Military Dependants (Pop)	0	0.00	1,689	0.09	0.00	0
Population estimate 2014	14,136	100.00	1,871,879	100.00	0.76	100

	Kilkeel LC - 15 minutes	Kilkeel LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index

H New Homemakers (Pop)						
H34 Buy-to-Let Territory (Pop)	0	0.00	4,061	0.22	0.00	0
H35 Brownfield Pioneers (Pop)	655	4.63	52,490	2.80	1.25	165
H36 Foot on the Ladder (Pop)	0	0.00	9,799	0.52	0.00	0
H37 First to Move In (Pop)	10	0.07	3,958	0.21	0.25	33
Population estimate 2014	14,136	100.00	1,871,879	100.00	0.76	100
	Kilkeel LC - 15 minutes	**Kilkeel LC - 15 minutes %**	**Northern Ireland**	**Northern Ireland %**	**Penetration**	**Index**
I Ex-Council Community (Pop)						
I38 Settled Ex-Tenants (Pop)	470	3.32	65,214	3.48	0.72	95
I39 Choice Right to Buy (Pop)	369	2.61	52,102	2.78	0.71	94
I40 Legacy of Labour (Pop)	483	3.42	41,424	2.21	1.17	154
I41 Stressed Borrowers (Pop)	528	3.74	32,950	1.76	1.60	212
Population estimate 2014	14,136	100.00	1,871,879	100.00	0.76	100
	Kilkeel LC - 15 minutes	**Kilkeel LC - 15 minutes %**	**Northern Ireland**	**Northern Ireland %**	**Penetration**	**Index**
J Claimant Cultures (Pop)						
J42 Worn-Out Workers (Pop)	401	2.84	141,372	7.55	0.28	38
J43 Streetwise Kids (Pop)	148	1.05	44,282	2.37	0.33	44
J44 New Parents in Need (Pop)	0	0.00	15,541	0.83	0.00	0
Population estimate 2014	14,136	100.00	1,871,879	100.00	0.76	100
	Kilkeel LC - 15 minutes	**Kilkeel LC - 15 minutes %**	**Northern Ireland**	**Northern Ireland %**	**Penetration**	**Index**
K Upper Floor Living (Pop)						
K45 Small Block Singles (Pop)	0	0.00	26,552	1.42	0.00	0
K46 Tenement Living (Pop)	0	0.00	12,087	0.65	0.00	0
K47 Deprived View (Pop)	0	0.00	955	0.05	0.00	0
K48 Multicultural Towers (Pop)	0	0.00	0	0.00	N/A	N/A
K49 Re-Housed Migrants (Pop)	0	0.00	0	0.00	N/A	N/A
Population estimate 2014	14,136	100.00	1,871,879	100.00	0.76	100
	Kilkeel LC - 15 minutes	**Kilkeel LC - 15 minutes %**	**Northern Ireland**	**Northern Ireland %**	**Penetration**	**Index**
L Elderly Needs (Pop)						
L50 Pensioners in Blocks (Pop)	0	0.00	25,503	1.36	0.00	0
L51 Sheltered Seniors (Pop)	59	0.42	10,330	0.55	0.57	76
L52 Meals on Wheels (Pop)	0	0.00	2,801	0.15	0.00	0
L53 Low Spending Elders (Pop)	139	0.98	35,505	1.90	0.39	52
Population estimate 2014	14,136	100.00	1,871,879	100.00	0.76	100
	Kilkeel LC - 15 minutes	**Kilkeel LC - 15 minutes %**	**Northern Ireland**	**Northern Ireland %**	**Penetration**	**Index**
M Industrial Heritage (Pop)						
M54 Clocking Off (Pop)	315	2.23	39,786	2.13	0.79	105
M55 Backyard Regeneration (Pop)	0	0.00	21,868	1.17	0.00	0
M56 Small Wage Owners (Pop)	168	1.19	35,502	1.90	0.47	63
Population estimate 2014	14,136	100.00	1,871,879	100.00	0.76	100

	Kilkeel LC - 15 minutes	Kilkeel LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
N Terraced Melting Pot (Pop)						
N57 Back-to-Back Basics (Pop)	0	0.00	25,791	1.38	0.00	0
N58 Asian Identities (Pop)	0	0.00	2,387	0.13	0.00	0
N59 Low-Key Starters (Pop)	134	0.95	34,947	1.87	0.38	51
N60 Global Fusion (Pop)	0	0.00	2,147	0.11	0.00	0
Population estimate 2014	14,136	100.00	1,871,879	100.00	0.76	100

	Kilkeel LC - 15 minutes	Kilkeel LC - 15 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
O Liberal Opinions (Pop)						
O61 Convivial Homeowners (Pop)	0	0.00	4,423	0.24	0.00	0
O62 Crash Pad Professionals (Pop)	0	0.00	5,116	0.27	0.00	0
O63 Urban Cool (Pop)	0	0.00	0	0.00	N/A	N/A
O64 Bright Young Things (Pop)	0	0.00	766	0.04	0.00	0
O65 Anti-Materialists (Pop)	0	0.00	12,969	0.69	0.00	0
O66 University Fringe (Pop)	0	0.00	11,172	0.60	0.00	0
O67 Study Buddies (Pop)	0	0.00	7,572	0.40	0.00	0
Population estimate 2014	14,136	100.00	1,871,879	100.00	0.76	100

MOSAIC UK Profile Report

Target Area: 10 minute drive time around Newcastle Centre *(Newry, Mourne & Down)*

Base Area: Northern Ireland

	Newcastle Centre - 10 minutes	Newcastle Centre - 10 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
Groups						
A Alpha Territory (Pop)	58	0.44	19,353	1.03	0.30	42
B Professional Rewards (Pop)	1,343	10.14	188,260	10.06	0.71	101
C Rural Solitude (Pop)	769	5.81	204,076	10.90	0.38	53
D Small Town Diversity (Pop)	4,146	31.30	255,872	13.67	1.62	229
E Active Retirement (Pop)	600	4.53	32,747	1.75	1.83	259
F Suburban Mindsets (Pop)	1,117	8.43	209,243	11.18	0.53	75
G Careers and Kids (Pop)	1,304	9.84	173,539	9.27	0.75	106
H New Homemakers (Pop)	221	1.67	70,308	3.76	0.31	45
I Ex-Council Community (Pop)	1,809	13.66	191,690	10.24	0.94	133
J Claimant Cultures (Pop)	831	6.27	201,195	10.75	0.41	58
K Upper Floor Living (Pop)	23	0.17	39,594	2.12	0.06	8
L Elderly Needs (Pop)	604	4.56	74,139	3.96	0.81	115
M Industrial Heritage (Pop)	263	1.98	97,156	5.19	0.27	38
N Terraced Melting Pot (Pop)	145	1.09	65,272	3.49	0.22	31
O Liberal Opinions (Pop)	0	0.00	42,018	2.24	0.00	0
Population estimate 2014	13,245	100.00	1,871,879	100.00	0.71	100

	Newcastle Centre - 10 minutes	Newcastle Centre - 10 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
A Alpha Territory (Pop)						
A01 Global Power Brokers (Pop)	0	0.00	0	0.00	N/A	N/A
A02 Voices of Authority (Pop)	0	0.00	6,306	0.34	0.00	0
A03 Business Class (Pop)	58	0.44	10,634	0.57	0.55	77
A04 Serious Money (Pop)	0	0.00	2,413	0.13	0.00	0
Population estimate 2014	13,245	100.00	1,871,879	100.00	0.71	100

	Newcastle Centre - 10 minutes	Newcastle Centre - 10 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
B Professional Rewards (Pop)						
B05 Mid-Career Climbers (Pop)	582	4.40	83,785	4.48	0.70	98
B06 Yesterday's Captains (Pop)	54	0.40	26,380	1.41	0.20	29
B07 Distinctive Success (Pop)	21	0.16	2,696	0.14	0.78	110
B08 Dormitory Villagers (Pop)	330	2.49	25,974	1.39	1.27	180
B09 Escape to the Country (Pop)	308	2.32	39,132	2.09	0.79	111

B10 Parish Guardians (Pop)	49	0.37	10,293	0.55	0.47	67
Population estimate 2014	13,245	100.00	1,871,879	100.00	0.71	100
	Newcastle Centre - 10 minutes	**Newcastle Centre - 10 minutes %**	**Northern Ireland**	**Northern Ireland %**	**Penetration**	**Index**
C Rural Solitude (Pop)						
C11 Squires Among Locals (Pop)	0	0.00	6,668	0.36	0.00	0
C12 Country Loving Elders (Pop)	205	1.54	17,875	0.95	1.14	162
C13 Modern Agribusiness (Pop)	565	4.26	139,460	7.45	0.41	57
C14 Farming Today (Pop)	0	0.00	28,040	1.50	0.00	0
C15 Upland Struggle (Pop)	0	0.00	12,033	0.64	0.00	0
Population estimate 2014	13,245	100.00	1,871,879	100.00	0.71	100
	Newcastle Centre - 10 minutes	**Newcastle Centre - 10 minutes %**	**Northern Ireland**	**Northern Ireland %**	**Penetration**	**Index**
D Small Town Diversity (Pop)						
D16 Side Street Singles (Pop)	553	4.18	14,241	0.76	3.88	549
D17 Jacks of All Trades (Pop)	269	2.03	65,955	3.52	0.41	58
D18 Hardworking Families (Pop)	857	6.47	77,033	4.12	1.11	157
D19 Innate Conservatives (Pop)	2,467	18.63	98,643	5.27	2.50	354
Population estimate 2014	13,245	100.00	1,871,879	100.00	0.71	100
	Newcastle Centre - 10 minutes	**Newcastle Centre - 10 minutes %**	**Northern Ireland**	**Northern Ireland %**	**Penetration**	**Index**
E Active Retirement (Pop)						
E20 Golden Retirement (Pop)	60	0.45	1,903	0.10	3.14	444
E21 Bungalow Quietude (Pop)	194	1.46	19,798	1.06	0.98	138
E22 Beachcombers (Pop)	226	1.71	3,247	0.17	6.96	984
E23 Balcony Downsizers (Pop)	121	0.91	7,799	0.42	1.55	219
Population estimate 2014	13,245	100.00	1,871,879	100.00	0.71	100
	Newcastle Centre - 10 minutes	**Newcastle Centre - 10 minutes %**	**Northern Ireland**	**Northern Ireland %**	**Penetration**	**Index**
F Suburban Mindsets (Pop)						
F24 Garden Suburbia (Pop)	221	1.67	31,858	1.70	0.69	98
F25 Production Managers (Pop)	15	0.11	35,484	1.90	0.04	6
F26 Mid-Market Families (Pop)	367	2.77	64,975	3.47	0.57	80
F27 Shop Floor Affluence (Pop)	474	3.58	70,627	3.77	0.67	95
F28 Asian Attainment (Pop)	40	0.30	6,299	0.34	0.64	90
Population estimate 2014	13,245	100.00	1,871,879	100.00	0.71	100
	Newcastle Centre - 10 minutes	**Newcastle Centre - 10 minutes %**	**Northern Ireland**	**Northern Ireland %**	**Penetration**	**Index**
G Careers and Kids (Pop)						
G29 Footloose Managers (Pop)	282	2.13	13,740	0.73	2.05	290
G30 Soccer Dads and Mums (Pop)	214	1.62	39,719	2.12	0.54	76
G31 Domestic Comfort (Pop)	507	3.83	51,482	2.75	0.99	139
G32 Childcare Years (Pop)	300	2.27	66,909	3.57	0.45	63

G33 Military Dependants (Pop)	0	0.00	1,689	0.09	0.00	0
Population estimate 2014	13,245	100.00	1,871,879	100.00	0.71	100
	Newcastle Centre - 10 minutes	**Newcastle Centre - 10 minutes %**	**Northern Ireland**	**Northern Ireland %**	**Penetration**	**Index**
H New Homemakers (Pop)						
H34 Buy-to-Let Territory (Pop)	0	0.00	4,061	0.22	0.00	0
H35 Brownfield Pioneers (Pop)	221	1.67	52,490	2.80	0.42	60
H36 Foot on the Ladder (Pop)	0	0.00	9,799	0.52	0.00	0
H37 First to Move In (Pop)	0	0.00	3,958	0.21	0.00	0
Population estimate 2014	13,245	100.00	1,871,879	100.00	0.71	100
	Newcastle Centre - 10 minutes	**Newcastle Centre - 10 minutes %**	**Northern Ireland**	**Northern Ireland %**	**Penetration**	**Index**
I Ex-Council Community (Pop)						
I38 Settled Ex-Tenants (Pop)	451	3.40	65,214	3.48	0.69	98
I39 Choice Right to Buy (Pop)	684	5.16	52,102	2.78	1.31	186
I40 Legacy of Labour (Pop)	184	1.39	41,424	2.21	0.44	63
I41 Stressed Borrowers (Pop)	490	3.70	32,950	1.76	1.49	210
Population estimate 2014	13,245	100.00	1,871,879	100.00	0.71	100
	Newcastle Centre - 10 minutes	**Newcastle Centre - 10 minutes %**	**Northern Ireland**	**Northern Ireland %**	**Penetration**	**Index**
J Claimant Cultures (Pop)						
J42 Worn-Out Workers (Pop)	808	6.10	141,372	7.55	0.57	81
J43 Streetwise Kids (Pop)	0	0.00	44,282	2.37	0.00	0
J44 New Parents in Need (Pop)	23	0.17	15,541	0.83	0.15	21
Population estimate 2014	13,245	100.00	1,871,879	100.00	0.71	100
	Newcastle Centre - 10 minutes	**Newcastle Centre - 10 minutes %**	**Northern Ireland**	**Northern Ireland %**	**Penetration**	**Index**
K Upper Floor Living (Pop)						
K45 Small Block Singles (Pop)	0	0.00	26,552	1.42	0.00	0
K46 Tenement Living (Pop)	23	0.17	12,087	0.65	0.19	27
K47 Deprived View (Pop)	0	0.00	955	0.05	0.00	0
K48 Multicultural Towers (Pop)	0	0.00	0	0.00	N/A	N/A
K49 Re-Housed Migrants (Pop)	0	0.00	0	0.00	N/A	N/A
Population estimate 2014	13,245	100.00	1,871,879	100.00	0.71	100
	Newcastle Centre - 10 minutes	**Newcastle Centre - 10 minutes %**	**Northern Ireland**	**Northern Ireland %**	**Penetration**	**Index**
L Elderly Needs (Pop)						
L50 Pensioners in Blocks (Pop)	119	0.90	25,503	1.36	0.47	66
L51 Sheltered Seniors (Pop)	91	0.69	10,330	0.55	0.88	125
L52 Meals on Wheels (Pop)	47	0.35	2,801	0.15	1.68	237
L53 Low Spending Elders (Pop)	347	2.62	35,505	1.90	0.98	138
Population estimate 2014	13,245	100.00	1,871,879	100.00	0.71	100
	Newcastle Centre - 10 minutes	**Newcastle Centre - 10 minutes %**	**Northern Ireland**	**Northern Ireland %**	**Penetration**	**Index**

M Industrial Heritage (Pop)						
M54 Clocking Off (Pop)	123	0.93	39,786	2.13	0.31	44
M55 Backyard Regeneration (Pop)	126	0.95	21,868	1.17	0.58	81
M56 Small Wage Owners (Pop)	14	0.11	35,502	1.90	0.04	6
Population estimate 2014	13,245	100.00	1,871,879	100.00	0.71	100

	Newcastle Centre - 10 minutes	Newcastle Centre - 10 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
N Terraced Melting Pot (Pop)						
N57 Back-to-Back Basics (Pop)	42	0.31	25,791	1.38	0.16	23
N58 Asian Identities (Pop)	0	0.00	2,387	0.13	0.00	0
N59 Low-Key Starters (Pop)	103	0.78	34,947	1.87	0.30	42
N60 Global Fusion (Pop)	0	0.00	2,147	0.11	0.00	0
Population estimate 2014	13,245	100.00	1,871,879	100.00	0.71	100

	Newcastle Centre - 10 minutes	Newcastle Centre - 10 minutes %	Northern Ireland	Northern Ireland %	Penetration	Index
O Liberal Opinions (Pop)						
O61 Convivial Homeowners (Pop)	0	0.00	4,423	0.24	0.00	0
O62 Crash Pad Professionals (Pop)	0	0.00	5,116	0.27	0.00	0
O63 Urban Cool (Pop)	0	0.00	0	0.00	N/A	N/A
O64 Bright Young Things (Pop)	0	0.00	766	0.04	0.00	0
O65 Anti-Materialists (Pop)	0	0.00	12,969	0.69	0.00	0
O66 University Fringe (Pop)	0	0.00	11,172	0.60	0.00	0
O67 Study Buddies (Pop)	0	0.00	7,572	0.40	0.00	0
Population estimate 2014	13,245	100.00	1,871,879	100.00	0.71	100

APPENDIX 2 – LATENT DEMAND REPORTS

ESTIMATE OF LATENT DEMAND FOR HEALTH AND FITNESS {NEW} NEWRY LEISURE CENTRE - 15 minute drive		
MOSAIC UK Type	**Total Population**	**Total Health & Fitness Demand**
A01 Global Power Brokers	0	0
A02 Voices of Authority	132	3
A03 Business Class	192	7
A04 Serious Money	0	0
B05 Mid-Career Climbers	2,795	133
B06 Yesterday's Captains	152	6
B07 Distinctive Success	39	2
B08 Dormitory Villagers	661	29
B09 Escape to the Country	1,213	54
B10 Parish Guardians	72	5
C11 Squires Among Locals	50	3
C12 Country Loving Elders	209	15
C13 Modern Agribusiness	3,469	249
C14 Farming Today	786	62
C15 Upland Struggle	122	13
D16 Side Street Singles	697	14
D17 Jacks of All Trades	2,538	85
D18 Hardworking Families	2,248	100
D19 Innate Conservatives	3,079	103
E20 Golden Retirement	0	0
E21 Bungalow Quietude	88	2
E22 Beachcombers	6	0
E23 Balcony Downsizers	106	2
F24 Garden Suburbia	2,889	89
F25 Production Managers	275	11
F26 Mid-Market Families	3,441	163
F27 Shop Floor Affluence	2,095	98
F28 Asian Attainment	176	5
G29 Footloose Managers	94	3
G30 Soccer Dads and Mums	1,469	80
G31 Domestic Comfort	2,254	128
G32 Childcare Years	2,742	155
G33 Military Dependants	0	0
H34 Buy-to-Let Territory	0	0
H35 Brownfield Pioneers	1,289	50
H36 Foot on the Ladder	134	5
H37 First to Move In	35	0
I38 Settled Ex-Tenants	2,800	106
I39 Choice Right to Buy	2,018	55
I40 Legacy of Labour	2,001	75
I41 Stressed Borrowers	2,790	77
J42 Worn-Out Workers	3,410	104
J43 Streetwise Kids	1,149	22
J44 New Parents in Need	251	8
K45 Small Block Singles	319	6

K46 Tenement Living	214	4
K47 Deprived View	0	0
K48 Multicultural Towers	0	0
K49 Re-Housed Migrants	0	0
L50 Pensioners in Blocks	683	12
L51 Sheltered Seniors	77	1
L52 Meals on Wheels	90	1
L53 Low Spending Elders	516	17
M54 Clocking Off	719	29
M55 Backyard Regeneration	469	15
M56 Small Wage Owners	941	33
N57 Back-to-Back Basics	531	14
N58 Asian Identities	0	0
N59 Low-Key Starters	1,438	39
N60 Global Fusion	0	0
O61 Convivial Homeowners	0	0
O62 Crash Pad Professionals	0	0
O63 Urban Cool	0	0
O64 Bright Young Things	0	0
O65 Anti-Materialists	357	7
O66 University Fringe	0	0
O67 Study Buddies	0	0
Sub Total	**56,373**	**2,297**
Add consideration for 15% of Members from outside catchment		*405*
Minus consideration for decay / excessive competition		*300*
Estimate of Latent Demand for Health & Fitness		**2,402**

ESTIMATE OF LATENT DEMAND FOR HEALTH AND FITNESS {NEW} DOWNPATRICK LEISURE CENTRE - 15 minute drive		
MOSAIC UK Type	**Total Population**	**Total Health & Fitness Demand**
A01 Global Power Brokers	0	0
A02 Voices of Authority	0	0
A03 Business Class	0	0
A04 Serious Money	0	0
B05 Mid-Career Climbers	2,847	147
B06 Yesterday's Captains	238	9
B07 Distinctive Success	24	1
B08 Dormitory Villagers	805	38
B09 Escape to the Country	1,473	71
B10 Parish Guardians	255	18
C11 Squires Among Locals	143	10
C12 Country Loving Elders	565	43
C13 Modern Agribusiness	3,199	249
C14 Farming Today	49	4
C15 Upland Struggle	0	0
D16 Side Street Singles	308	7
D17 Jacks of All Trades	1,326	48
D18 Hardworking Families	2,465	118
D19 Innate Conservatives	3,158	114
E20 Golden Retirement	25	1
E21 Bungalow Quietude	184	4
E22 Beachcombers	0	0
E23 Balcony Downsizers	13	0
F24 Garden Suburbia	603	20
F25 Production Managers	48	2
F26 Mid-Market Families	1,032	53
F27 Shop Floor Affluence	1,344	68
F28 Asian Attainment	41	1
G29 Footloose Managers	268	9
G30 Soccer Dads and Mums	357	21
G31 Domestic Comfort	905	56
G32 Childcare Years	1,570	96
G33 Military Dependants	131	2
H34 Buy-to-Let Territory	0	0
H35 Brownfield Pioneers	791	33
H36 Foot on the Ladder	149	6
H37 First to Move In	143	2
I38 Settled Ex-Tenants	2,326	95
I39 Choice Right to Buy	2,233	66
I40 Legacy of Labour	458	19
I41 Stressed Borrowers	1,225	37
J42 Worn-Out Workers	1,946	64
J43 Streetwise Kids	1,394	29
J44 New Parents in Need	237	9
K45 Small Block Singles	239	5
K46 Tenement Living	128	3
K47 Deprived View	0	0

K48 Multicultural Towers	0	0
K49 Re-Housed Migrants	0	0
L50 Pensioners in Blocks	94	2
L51 Sheltered Seniors	93	1
L52 Meals on Wheels	0	0
L53 Low Spending Elders	875	30
M54 Clocking Off	300	13
M55 Backyard Regeneration	564	20
M56 Small Wage Owners	180	7
N57 Back-to-Back Basics	419	12
N58 Asian Identities	0	0
N59 Low-Key Starters	399	12
N60 Global Fusion	0	0
O61 Convivial Homeowners	0	0
O62 Crash Pad Professionals	0	0
O63 Urban Cool	0	0
O64 Bright Young Things	0	0
O65 Anti-Materialists	0	0
O66 University Fringe	22	1
O67 Study Buddies	0	0
Sub Total	37,834	1,675
Add consideration for 20% of Members from outside catchment		*419*
Minus consideration for decay / excessive competition		*n/a*
Estimate of Latent Demand for Health & Fitness		**2,094**

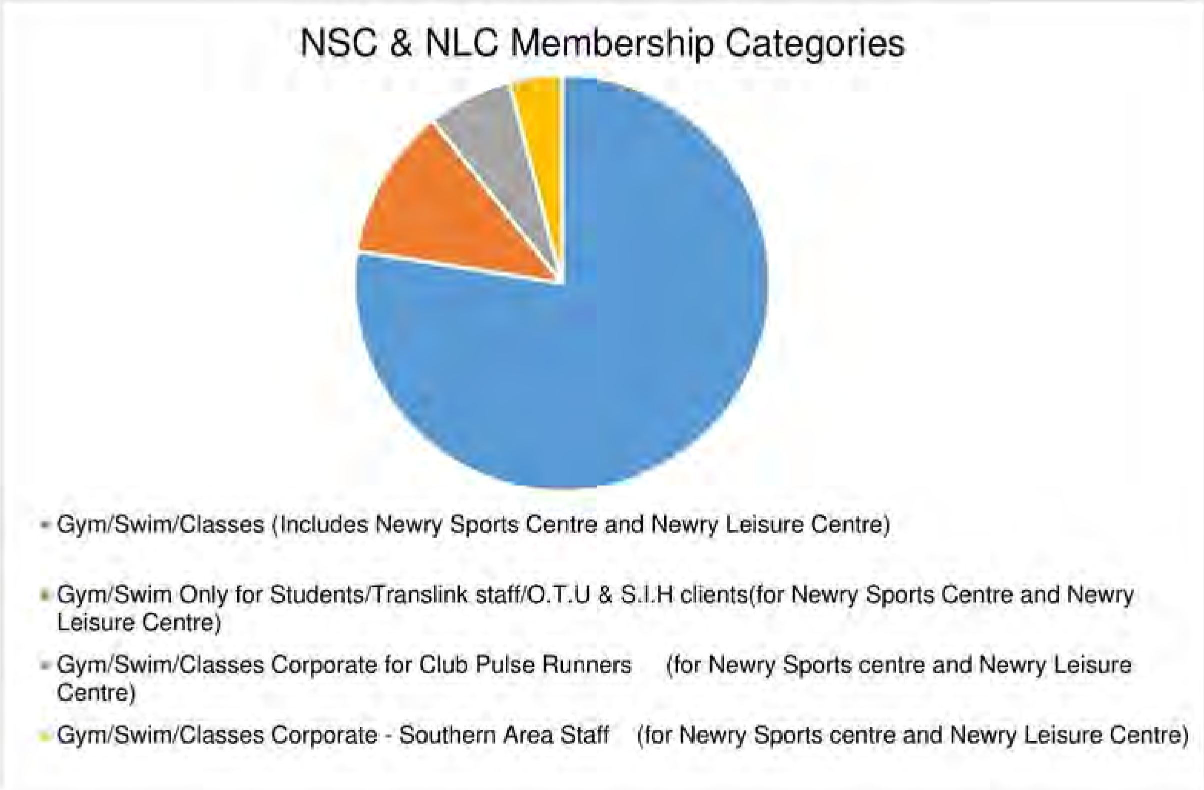
ESTIMATE OF LATENT DEMAND FOR HEALTH AND FITNESS KILKEEL LEISURE CENTRE - 15 minute drive		
MOSAIC UK Type	**Total Population**	**Total Health & Fitness Demand**
A01 Global Power Brokers	0	0
A02 Voices of Authority	0	0
A03 Business Class	0	0
A04 Serious Money	0	0
B05 Mid-Career Climbers	168	8
B06 Yesterday's Captains	0	0
B07 Distinctive Success	7	0
B08 Dormitory Villagers	207	9
B09 Escape to the Country	580	26
B10 Parish Guardians	30	2
C11 Squires Among Locals	51	3
C12 Country Loving Elders	669	47
C13 Modern Agribusiness	3,043	182
C14 Farming Today	297	23
C15 Upland Struggle	0	0
D16 Side Street Singles	156	3
D17 Jacks of All Trades	1,399	47
D18 Hardworking Families	804	36
D19 Innate Conservatives	1,312	44
E20 Golden Retirement	0	0
E21 Bungalow Quietude	56	1
E22 Beachcombers	0	0
E23 Balcony Downsizers	0	0
F24 Garden Suburbia	0	0
F25 Production Managers	0	0
F26 Mid-Market Families	399	19
F27 Shop Floor Affluence	658	31
F28 Asian Attainment	0	0
G29 Footloose Managers	4	0
G30 Soccer Dads and Mums	66	4
G31 Domestic Comfort	0	0
G32 Childcare Years	351	20
G33 Military Dependants	0	0
H34 Buy-to-Let Territory	0	0
H35 Brownfield Pioneers	655	25
H36 Foot on the Ladder	0	0
H37 First to Move In	10	0
I38 Settled Ex-Tenants	470	18
I39 Choice Right to Buy	369	10
I40 Legacy of Labour	483	18
I41 Stressed Borrowers	528	15
J42 Worn-Out Workers	401	12
J43 Streetwise Kids	148	3
J44 New Parents in Need	0	0
K45 Small Block Singles	0	0
K46 Tenement Living	0	0
K47 Deprived View	0	0

K48 Multicultural Towers	0	0
K49 Re-Housed Migrants	0	0
L50 Pensioners in Blocks	0	0
L51 Sheltered Seniors	59	0
L52 Meals on Wheels	0	0
L53 Low Spending Elders	139	4
M54 Clocking Off	315	13
M55 Backyard Regeneration	0	0
M56 Small Wage Owners	168	6
N57 Back-to-Back Basics	0	0
N58 Asian Identities	0	0
N59 Low-Key Starters	134	4
N60 Global Fusion	0	0
O61 Convivial Homeowners	0	0
O62 Crash Pad Professionals	0	0
O63 Urban Cool	0	0
O64 Bright Young Things	0	0
O65 Anti-Materialists	0	0
O66 University Fringe	0	0
O67 Study Buddies	0	0
Sub Total	14,136	633
Add consideration for 15% of Members from outside catchment		*112*
Minus consideration for decay / excessive competition		*n/a*
Estimate of Latent Demand for Health & Fitness		**745**

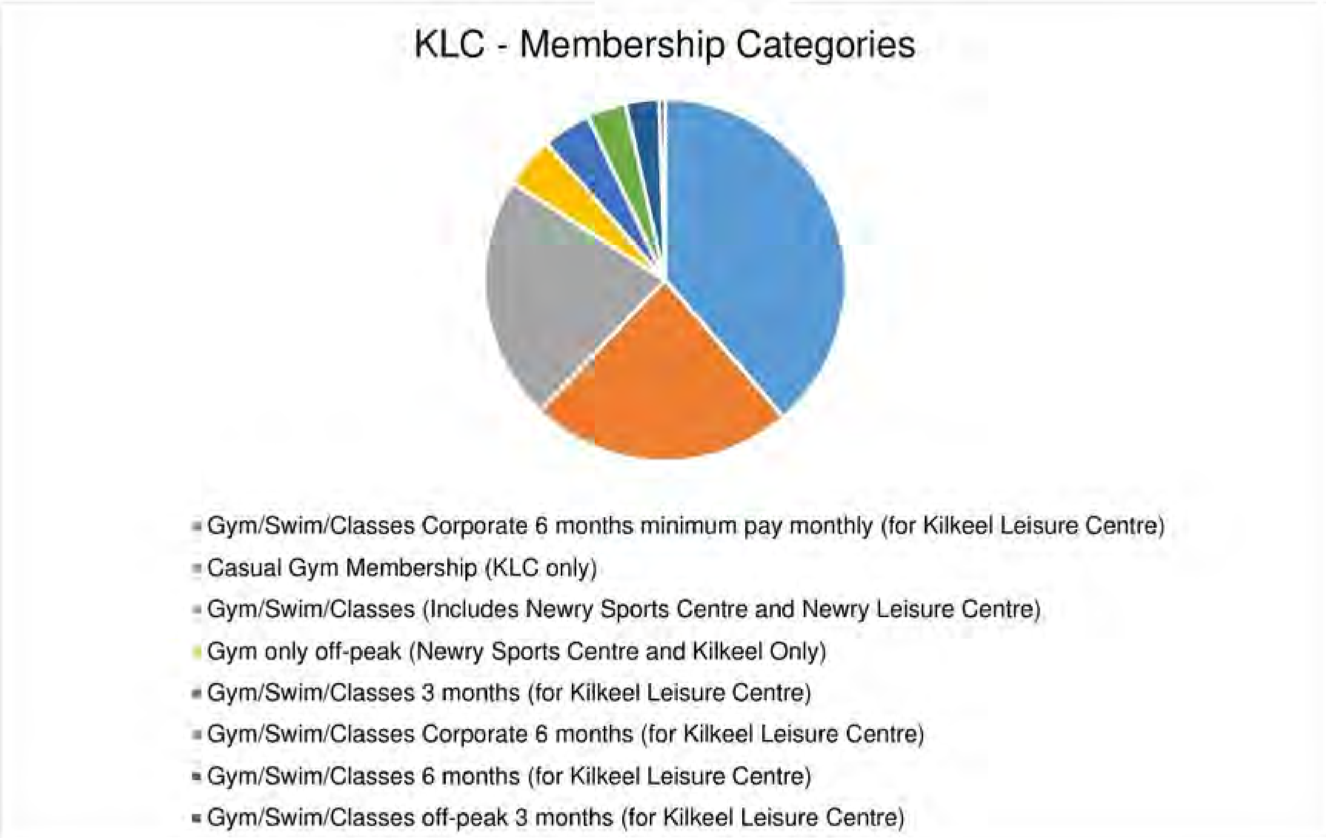
ESTIMATE OF LATENT DEMAND FOR HEALTH AND FITNESS NEWCASTLE CENTRE - 10 minute drive		
MOSAIC UK Type	**Total Population**	**Total Health & Fitness Demand**
A01 Global Power Brokers	0	0
A02 Voices of Authority	0	0
A03 Business Class	58	2
A04 Serious Money	0	0
B05 Mid-Career Climbers	582	23
B06 Yesterday's Captains	54	2
B07 Distinctive Success	21	1
B08 Dormitory Villagers	330	12
B09 Escape to the Country	308	11
B10 Parish Guardians	49	3
C11 Squires Among Locals	0	0
C12 Country Loving Elders	205	12
C13 Modern Agribusiness	565	34
C14 Farming Today	0	0
C15 Upland Struggle	0	0
D16 Side Street Singles	553	9
D17 Jacks of All Trades	269	7
D18 Hardworking Families	857	32
D19 Innate Conservatives	2,467	69
E20 Golden Retirement	60	1
E21 Bungalow Quietude	194	3
E22 Beachcombers	226	7
E23 Balcony Downsizers	121	2
F24 Garden Suburbia	221	6
F25 Production Managers	15	0
F26 Mid-Market Families	367	14
F27 Shop Floor Affluence	474	19
F28 Asian Attainment	40	1
G29 Footloose Managers	282	7
G30 Soccer Dads and Mums	214	10
G31 Domestic Comfort	507	24
G32 Childcare Years	300	14
G33 Military Dependants	0	0
H34 Buy-to-Let Territory	0	0
H35 Brownfield Pioneers	221	7
H36 Foot on the Ladder	0	0
H37 First to Move In	0	0
I38 Settled Ex-Tenants	451	14
I39 Choice Right to Buy	684	15
I40 Legacy of Labour	184	6
I41 Stressed Borrowers	490	11
J42 Worn-Out Workers	808	20
J43 Streetwise Kids	0	0
J44 New Parents in Need	23	1
K45 Small Block Singles	0	0
K46 Tenement Living	23	0
K47 Deprived View	0	0

K48 Multicultural Towers	0	0
K49 Re-Housed Migrants	0	0
L50 Pensioners in Blocks	119	2
L51 Sheltered Seniors	91	1
L52 Meals on Wheels	47	0
L53 Low Spending Elders	347	9
M54 Clocking Off	123	4
M55 Backyard Regeneration	126	3
M56 Small Wage Owners	14	0
N57 Back-to-Back Basics	42	1
N58 Asian Identities	0	0
N59 Low-Key Starters	103	2
N60 Global Fusion	0	0
O61 Convivial Homeowners	0	0
O62 Crash Pad Professionals	0	0
O63 Urban Cool	0	0
O64 Bright Young Things	0	0
O65 Anti-Materialists	0	0
O66 University Fringe	0	0
O67 Study Buddies	0	0
Sub Total	13,245	424
Add consideration for 20% of Members from outside catchment		*106*
Minus consideration for decay / excessive competition		*150*
Estimate of Latent Demand for Health & Fitness		**380**

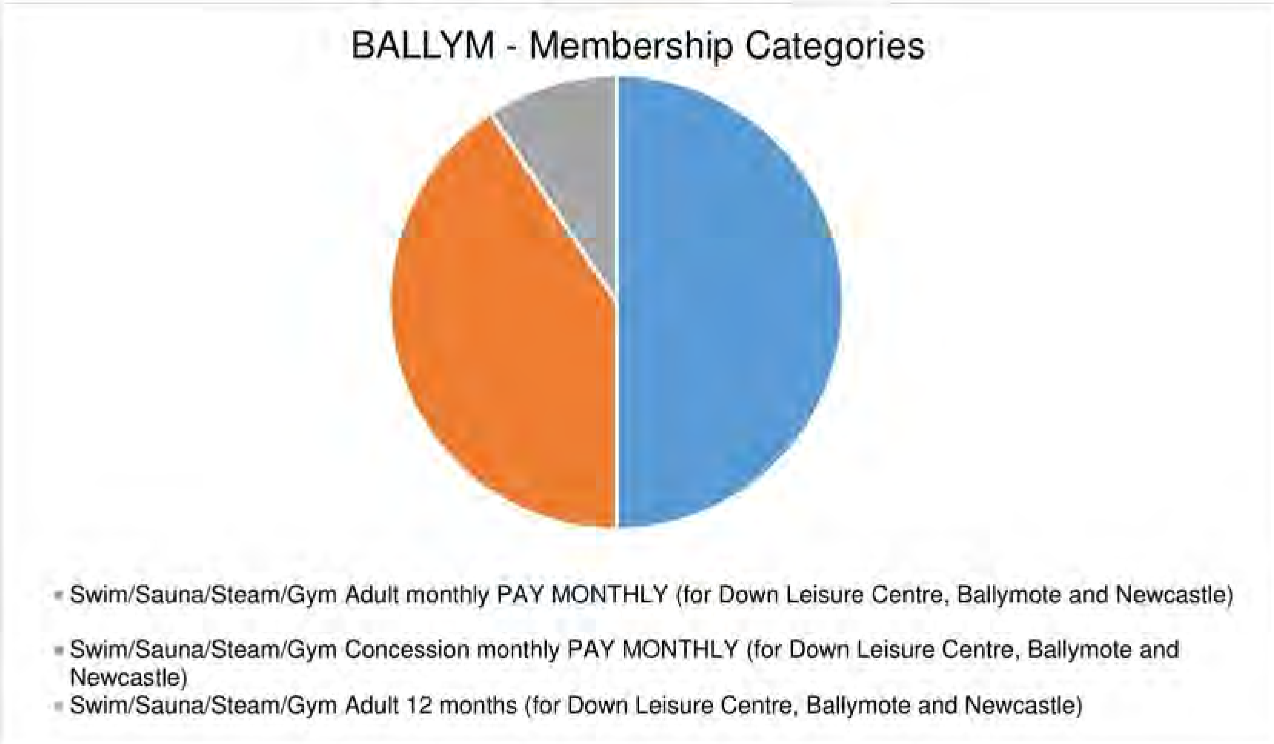
APPENDIX 3 – FITNESS MEMBERSHIP CATEGORIES




DLC - Membership Categories
Swim/Sauna/Steam/Gym Adult monthly PAY MONTHLY (for Down Leisure Centre, Ballymote and Newcastle)
Swim/Sauna/Steam/Gym Concession monthly PAY MONTHLY (for Down Leisure Centre, Ballymote and Newcastle)
Swim/Sauna/Steam/Gym Adult 12 months (for Down Leisure Centre, Ballymote and Newcastle)


KLC - Membership Categories
Gym/Swim/Classes Corporate 6 months minimum pay monthly (for Kilkeel Leisure Centre)
Casual Gym Membership (KLC only)
Gym/Swim/Classes (Includes Newry Sports Centre and Newry Leisure Centre)
Gym only off-peak (Newry Sports Centre and Kilkeel Only)
Gym/Swim/Classes 3 months (for Kilkeel Leisure Centre)
Gym/Swim/Classes Corporate 6 months (for Kilkeel Leisure Centre)
Gym/Swim/Classes 6 months (for Kilkeel Leisure Centre)
Gym/Swim/Classes off-peak 3 months (for Kilkeel Leisure Centre)


NEW - Membership Categories
Swim/Sauna/Steam/Gym Adult monthly PAY MONTHLY (for Down Leisure Centre, Ballymote and Newcastle)
Swim/Sauna/Steam/Gym Concession monthly PAY MONTHLY (for Down Leisure Centre, Ballymote and Newcastle)
Swim/Sauna/Steam/Gym Adult 12 months (for Down Leisure Centre, Ballymote and Newcastle)


BALLYM - Membership Categories
Swim/Sauna/Steam/Gym Adult monthly PAY MONTHLY (for Down Leisure Centre, Ballymote and Newcastle)
Swim/Sauna/Steam/Gym Concession monthly PAY MONTHLY (for Down Leisure Centre, Ballymote and Newcastle)
Swim/Sauna/Steam/Gym Adult 12 months (for Down Leisure Centre, Ballymote and Newcastle)

APPENDIX 4 – SPORTS HALL OCCUPANCY

NSC

	Hours open	courts	total hours	hours booked	occupancy
Monday	13	6	78	8	10%
Tuesday	13	6	78	23	29%
Wednesday	13	6	78	12	15%
Thursday	13	6	78	24	31%
Friday	13	6	78	18	23%
Saturday	7.5	6	45	12	27%
Sunday	3.5	6	21	8	38%
	76	**42**	**456**	**105**	**25%**

DLC

	Hours open	courts	total hours	hours booked	occupancy
Monday	14	3	42	21	50%
Tuesday	14	3	42	12	29%
Wednesday	14	3	42	9	21%
Thursday	14	3	42	8	19%
Friday	14	3	42	13.5	32%
Saturday	7	3	21	13	62%
Sunday	3.5	3	10.5	0	0%
	80.5	**21**	**241.5**	**76.5**	**30%**

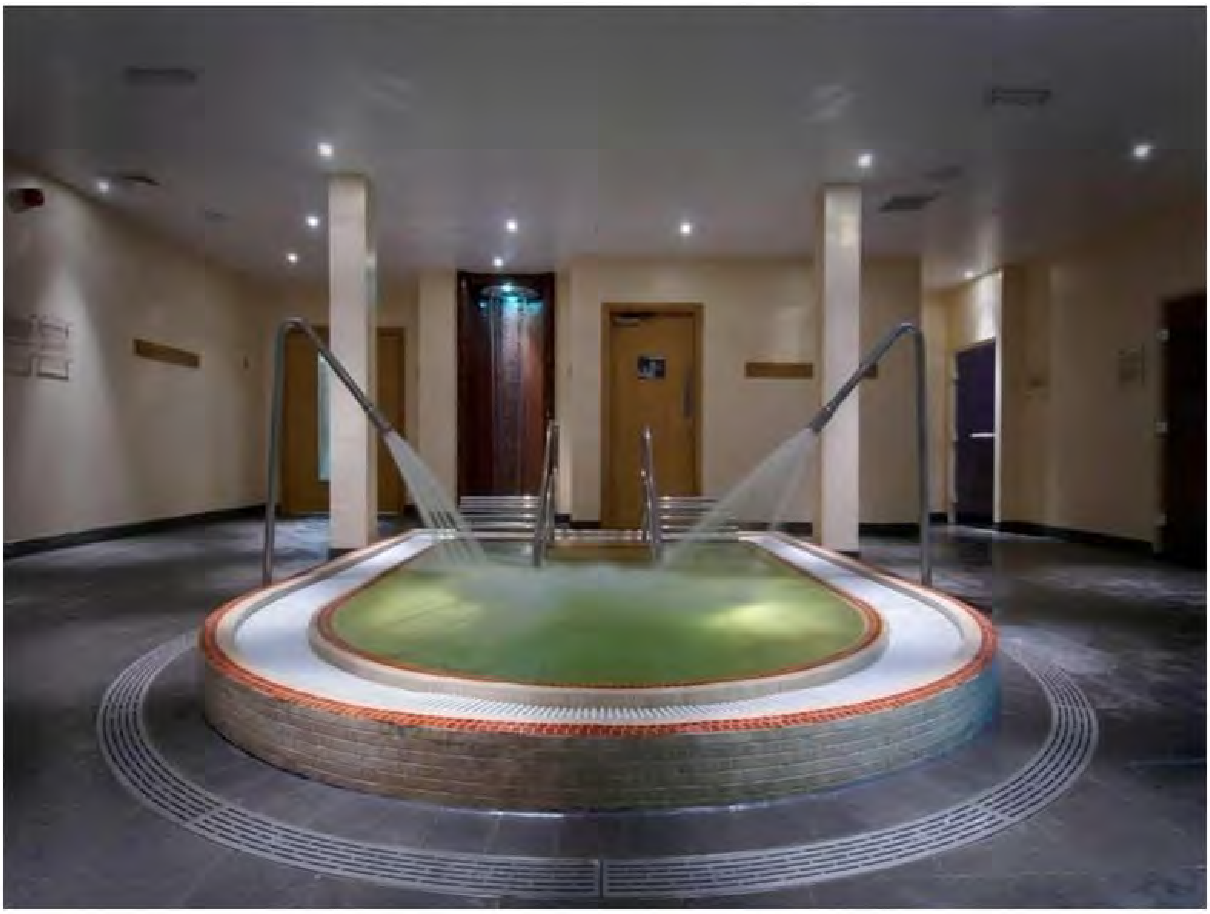
KLC

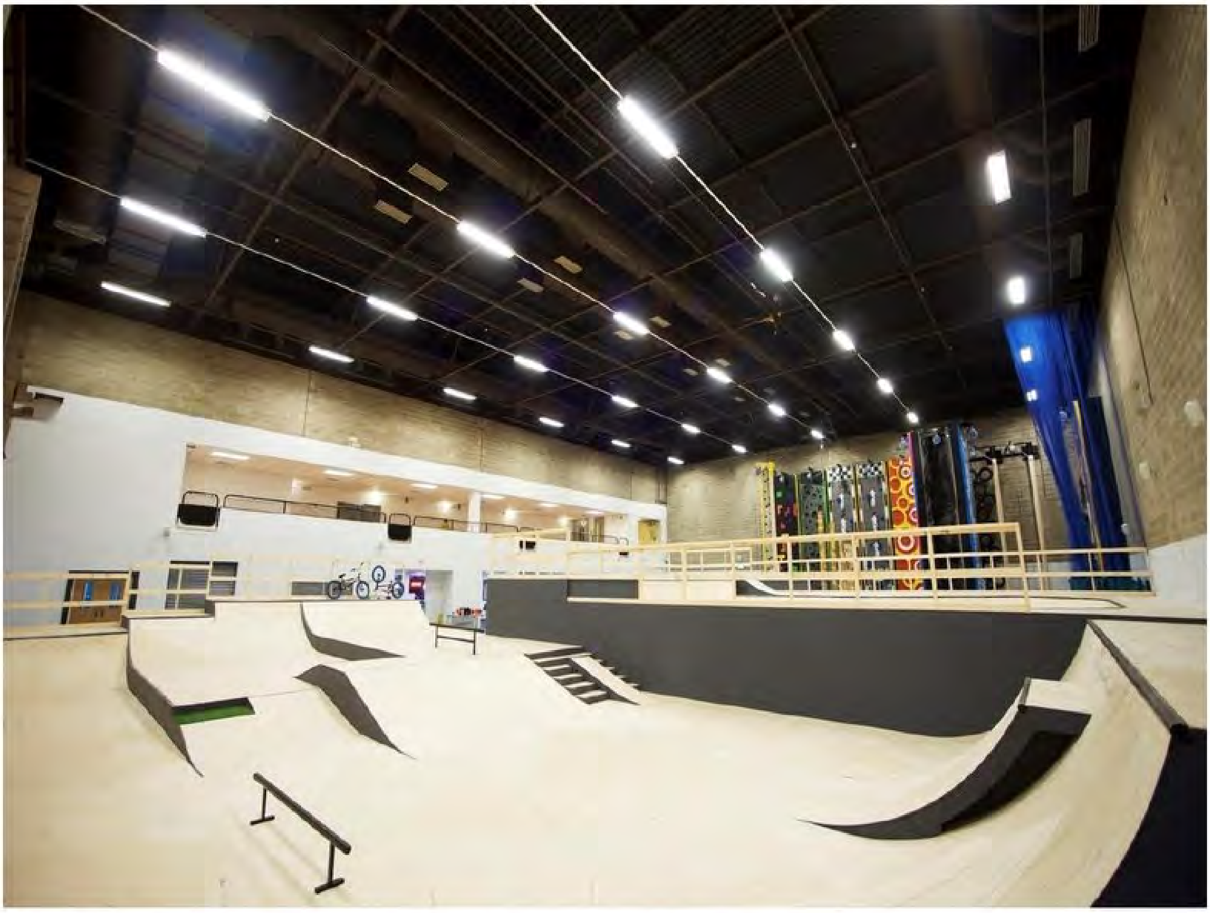
	Hours open	courts	total hours	hours booked	occupancy
Monday	12.75	3	38.25	18	47%
Tuesday	12.75	3	38.25	21	55%
Wednesday	12.75	3	38.25	19	50%
Thursday	12.75	3	38.25	24	63%
Friday	12.75	3	38.25	19	50%
Saturday	5.75	3	17.25	15	87%
Sunday	4.25	3	12.75	0	0%
	73.75	**21**	**221.25**	**116**	**50%**

BMOTE

	Hours open	courts	total hours	hours booked	occupancy
Monday	12.75	4	51	19	37%
Tuesday	12.75	4	51	27	53%
Wednesday	12.75	4	51	23	45%
Thursday	12.75	4	51	15	29%
Friday	12.75	4	51	14	27%
Saturday	5.75	4	23	6.5	28%
Sunday	4.25	4	17	0	0%
	73.75	**28**	**295**	**104.5**	**31%**

APPENDIX 4 – IMAGES FOR ALTERNATIVE FACILITIES IN SPORTS HALLS






SELECT YOUR
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Report to:	Active and Healthy Communities
Date of Meeting:	19 September 2016
Subject:	NLC Phase 2 Operating Model
Reporting Officer (Including Job Title):	Roland Moore, Assistant Director Leisure and Sport
Contact Officer (Including Job Title):	Kieran Gordon, Head of Indoor Leisure

Decisions required:

Members are asked to note the contents of the report, and consider and agree to:
NLC Phase 2 Operating Model

1.0	**Purpose and Background:**
1.1	Newry Leisure Centre Phase 2 has now commenced construction. The contractor has provided their construction timetable and with this in mind, arrangements need to be finalised for NLC Phase 2 staffing and operational model to allow sufficient time for preparation and familiarisation prior to Phase 2 opening.
2.0	**Key issues:**
2.1	NLC Phase 1 practical completion was during March 2015. Upon opening, legacy NMDC agreed to a pool facility timetable and subsequent staffing requirements based on the below public opening hours: Mon, Wed, Fri: 6.30am-9.30pm Tue & Thur: 8am-9.30pm Saturday: 9am-5.30pm Sunday: 1.30am-5.30pm Due to additional bookings, staffing operational hours at NLC Phase 1 are as follows: Mon,Tue, Wed, Fri: 6am-10.30pm Thur: 7.30am-10.30pm Saturday: 6.30am-6pm (Sept-June) 8.30am-6pm (July & Aug) Sunday: 7.30am-6pm (Sept-June) 12pm-6pm (July & Aug)
2.2	Refer to Appendix A for details of existing NLC Phase 1 and Newry Sports Centre operational arrangements. In summary, it is proposed to maintain the current NLC Phase 1 opening hours when Phase 2 opens with the addition of Sunday morning opening for the dryside for the public (note that wet-side staff cover already in place due to long standing club bookings).

	<u>Proposed public opening hours for NLC Phase 2:</u> Mon, Wed, Fri: 6.30am-10pm Tue & Thur: 8am-10pm Saturday: 9am-5.30pm Sunday: 10am-5.30pm (Wet side public opening at 10.30pm Sept-June)
2.3	• NLC Phase 2 is proposed to be open 16% more on a weekly basis compared to the existing Newry Sports Centre with a total of 88 weekly hours open to the public • It is proposed to review operational practices via consultation. • Officers believe that by implementing increased efficiencies these proposed opening and operational arrangements can be achieved with little or no impact on budgets.
3.0	**Recommendations:**
3.1	(1) It is recommended that approval is given for proposed opening arrangements as set out in 2.2 and on the basis of the summary as set out in 2.3. (2) Officers to commence consultation with staff over proposed hours and shifts and also clubs and user groups in relation to booking provision. (3) Upon conclusion of consultation process, this will enable Officers the ability to provide an accurate budget proposal for 2017/18 rates estimates process. (4)Officers and staff to then further develop the transitional plans and preparations needed for the future opening of NLC Phase 2. These proposed arrangements should allow an ability to adapt over time as customer focus will be key.
4.0	**Resource implications:**
4.1	It is anticipated that there will be little increase to the current 2016/17 over all budgets. Proposals will also be reviewed by 3rd party Consultant as per NLC Phase 1 to ensure that proposed operating arrangements are meeting all necessary Health and Safety arrangements. The costs of which should be met from the revenue budget across existing NLC Phase 1 and Newry Sports Centre.
5.0	**Equality and good relations implications:**
5.1	To be assessed for Equality and Good Relations implications.
6.0	**Appendices**
	Appendix 1 – proposed Operating Arrangements for NLC Phase 2

Appendix A

1.0 Proposed Operating Arrangements for NLC Phase 2

Current Newry Sports Centre versus NLC Phase 1 Opening Hours

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Totals
Current Newry Sports Centre Opening Times	09.00 - 22.00	09.00 - 22.00	09.00 - 22.00	09.00 - 22.00	09.00 - 22.00	10.00 - 17.30	14.00 - 17.30	
Current Newry Sports Centre Public Daily Hours	13	13	13	13	13	7.5	3.5	76 hrs weekly

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Totals
Current NLC Phase 1 Opening Times	06.30-21.30	08.00-21.30	06.30-21.30	08.00-21.30	06.30-21.30	9.00-17.30	13.30-17.30	
Current NLC Phase 1 Public Daily Hours	15	13.5	15	13.5	15	8.5	4	84.5 hrs weekly

% increase in weekly public opening times NLC Phase 1 versus existing Newry Sports Centre	11 %

2.0 Current Newry Sports Centre versus NLC Phase 2 Proposed Opening Hours

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Totals
Current Newry Sports Centre Opening Times	09.00 - 22.00	09.00 - 22.00	09.00 - 22.00	09.00 - 22.00	09.00 - 22.00	10.00 - 17.30	14.00 - 17.30	
Current Newry Sports Centre Public Daily Hours	13	13	13	13	13	7.5	3.5	76 hrs weekly

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Totals
Proposed NLC Phase 2 Opening Times	06.30-21.30	08.00-21.30	06.30-21.30	08.00-21.30	06.30-21.30	9.00-17.30	10.00-17.30	
Proposed NLC Phase 2 Public Daily Hours	15	13.5	15	13.5	15	8.5	7.5	88 hrs weekly

% increase in weekly public opening times proposed NLC Phase 2 versus existing Newry Sports Centre	16 %

Upon review of NLC Phase 1 staffing model, Independent Health and Safety industry experts QLM noted that they were satisfied with our staffing structure based on proposed pool user programme and facility opening hours. QLM noted the expectations of staff levels were appropriate and if reductions in staff structure were to be considered then this would necessitate a reduction in each specific facility that are to be open to the users which in turn will have an impact on revenue and user satisfaction levels.