



ACT GOVERNMENT- SPORT AND RECREATION SERVICES
FULL REPORT
ACT INDOOR SPORTS FACILITIES STUDY

Final

December 2015



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SUMMARY REPORT

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1 EXECUTIVE SUMMARY

1.1 INTRODUCTION

The ACT Government commissioned this study to examine the state of indoor sports facilities provision and utilisation within the ACT. The study will provide guidance on planning to ensure there is sufficient provision of indoor sports facilities for the next 15 years.

A five stage approach was used in conducting this study, including background research, facility audit, stakeholder engagement, information analysis and report development. Stakeholder engagement included both user groups/ sports and the individuals, clubs and agencies managing facilities.

The various indoor sports users can be grouped into the following:

- Indoor Court “Ball” Sports (Basketball, Volleyball, Netball, Futsal)
- Indoor “Racquet/ Bat” Sports (Tennis, Squash, Hockey, Badminton, Cricket)
- Ice Sports (Ice Skating, Ice Hockey, Broomball etc.)
- Roller Sports (Blading, Skating, Roller Hockey, Roller Derby etc.)
- Gymnastics and allied (Cheerleading, Rhythmic, Apparatus etc.)
- Martial Arts and Combat Sports (Fencing, Judo, Karate, Boxing etc.)

1.2 KEY FINDINGS

The study has resulted in a range of findings regarding indoor facility provision, management and planning. The background information and basis for the findings is discussed in more detail in the relevant sections of the Summary Report and the detailed analysis, results of consultation and review of facilities are all contained within the Background Report. The following is a brief overview of those findings that are critical to planning for future provision.

1.2.1 Existing Facilities

Existing provision in the ACT is a mix of commercial, club, school, university and community based organisations. In general facilities fall into one of the following:

- Commercially operated facilities offering a mix of internally run programs, social sport and court hire to external users. (e.g. mpowerdome)
- Facilities operated by a specific sport with a primary focus on providing for their sport but often including social sport programs and some external hire opportunities. (e.g. Lyneham Netball Centre)
- Facilities operated by a specific sport which are not configured for multi-use and are managed for the resident sports use only. (e.g. Gymnastics)
- University/ CIT/ School facilities that are managed to provide for internal needs and may or may not provide access to external hirers.

The current provision in ACT is:

- 35 indoor sports courts, of which 6 facilities provide 3 or more sports courts in a single location and 1 is closing (Woden Basketball Stadium).
- 25 indoor sports courts at schools available for community use.
- 15 indoor cricket or indoor tennis/ multi use courts (e.g. mpowerdome, ACT Tennis Centre)
- 31 publicly accessible squash courts
- 5 gymnastics venues
- 1 Ice rink
- 1 table tennis centre (5 tables)
- A number of halls and community centres used for fencing, martial arts, dance etc.

1.2.2 Adequacy of Current Provision

A critical issue for court sports is the provision of multi court facilities that allow the efficient running of competitions. Access during peak hours (between 4 pm and 9 -10 pm weeknights and weekend days) to multi court facilities (particularly those with 3+ courts) is highly competitive. Compounding this is the need for training space and access to court hours for training. Training use is less dependent on multi-court facilities and can easily be catered for on single court facilities however the peak demand hours remain the same.

In addition to the high demand for access to courts during peak hours there are a number of “legacy” issues with existing facilities where the design does not meet contemporary standards or the original facility design did not envisage multiple or external use.

All centres report very high demand during week night peak hours. Most sports report difficulty in gaining sufficient court hours for competition and training.

Most centres report some available capacity during weekdays and some weekend times.

Several sports report that lack of access to additional court space is constraining their ability to grow participation.

Several sports are using “spaces” that are not strictly compliant with the contemporary standards for their sport.

Adequacy of current provision is also affected by cost of hire and the need for certainty of access times to allow scheduling.

For some sports access to a venue that can support major competitive events is a key issue. Difficulties include both cost of hire and access to sufficient blocks of time.

Some school facilities may be underutilised and offer the best opportunity to address the need for training venues which could also free up court hours at larger venues.

1.2.3. Future Planning Considerations

With the ACT’s population expected to exceed 500,000 people by 2032 (currently 386,000); additional indoor sports facilities will be required to accommodate growth and meet future sport and recreation needs.

In the short term there is a demonstrated shortage of supply of multi-court facilities and a pending loss of 4 courts (Woden Basketball Stadium and Woden CIT). However a new commercial indoor cricket facility in Gungahlin is planned and other organisations are planning expansion of existing facilities. In addition the opportunity to increase use of school facilities can assist immediately, particularly to meet demand for training.

In the medium to long term, additional indoor sport facilities will be needed to service the growth regions of Molonglo, Gungahlin and West Belconnen.

Population growth alone will create significant demand for more indoor sport facilities. In addition changing participation trends indicate that social sport will continue to grow and be increasingly delivered as a commercial (or consumer) opportunity (e.g. pay – play-and away).

Volunteerism is declining and consequently, the capacity of community clubs to manage facilities through volunteer models is also diminishing.

When investigating options for meeting future demand, the following points should be considered:

- ▶ The most cost effective and sustainable model of provision is usually a commercial multi-court facility provided as part of a large multi-use facility (e.g. aquatic, fitness and indoor sports).
- ▶ Indoor centres are far more viable over time if they are designed to accommodate a range of uses and can be responsive to market changes and changing participation trends.
- ▶ Contemporary design for successful commercial leisure centres includes a range of activity spaces and expanded services such as cafés and allied health services.
- ▶ Single-purpose (e.g. sport owned facilities) require a strong business case to ensure they are viable over time and that the organisation has the capacity to manage the facility sustainably.
- ▶ Increasing provision may be more effectively achieved in some locations through upgrading of existing facilities.
- ▶ The viability of indoor sport facilities relies on being able to service a specific catchment. Planning for new facilities needs to consider other facilities servicing the same catchment and should be wary of over servicing which can impact on the viability of existing and proposed facilities.

1.3 SUMMARY OF RECOMMENDATIONS

The following is a summary of the key recommendations arising from the study. For the detailed recommendations, subsequent strategies and the rationale behind them please go to Section 4 of this Summary Report.

1. Increase Community Use of Indoor Sport Facilities at Schools
2. Ensure New Multi-Court Facilities are Provided to Service Growth Areas.
3. Investigate Sustainable Options for Increasing Capacity at and Use of, Existing Centres.
4. Ensure that all New Facility Proposals or Proposals for Expansion of Existing Facilities are Tested for Viability and Sustainability.
5. Encourage Sustainable Provision of Squash Facilities at the Current Level.
6. Encourage Ice Sports to Develop a Future Facility Strategy.
7. Investigate Options for Improving Provision of Gymnastics Facilities within Canberra.
8. Ensure that Smaller and Emerging Indoor Sports are Supported to Find Suitable Locations for Training and Competition.



2 BACKGROUND TO STUDY

The ACT Government has been proactive in its approach to identifying strategic priorities for sport and recreation within the Territory. Active 2020 – A Strategic Plan for Sport and Active Recreation in the ACT and region 2011-2020 was developed to “provide a blueprint upon which sport and recreation will be nurtured and promoted over this period 2011-2020”. In the lead up to the 2012 election, the ACT Government committed to undertake a feasibility study for an indoor sports facility on Canberra’s North. The proposed feasibility study was a direct outcome identified by the ACT Government to address the “Maximise Supporting Infrastructure” priority of the Active 2020 Plan. Active 2020 identifies amongst its seven fundamental goals, the promotion of support for infrastructure and resources, which includes long-term infrastructure, facility and resource plans.

In order to obtain a more comprehensive understanding of the current indoor sports facility landscape, and

inform future consideration of infrastructure planning and developments, the scope of the original project was modified to develop a more strategic basis for decision making and to build an evidence base for future planning.

This project aimed to undertake an audit, including usage trends and gap analysis, of current facilities across the ACT. The Territory Government is acutely aware of the issues and challenges faced in providing indoor sport facilities that balance community requirements with financial sustainability.

This study is not a feasibility investigation of any specific proposals and only provides information for consideration in future provision planning. The recommendations are for general guidance and direction only.

2.1 PURPOSE

The purpose of this study is to “Examine the state of Indoor Sports Facilities throughout the ACT”. The findings of this study will provide guidance for any future consideration of indoor sports facility provision. Together with the

findings of other relevant studies, overall planning for ACT and economic considerations this study will help to establish a framework for provision of indoor sport opportunities over the next 15 years.



2.2 METHODOLOGY

A five stage approach was used in conducting this study. It enabled consultation to be undertaken in a logical and progressive fashion, and recommendations to be presented within the agreed framework.

These five stages are shown in Figure 1, on the following page.

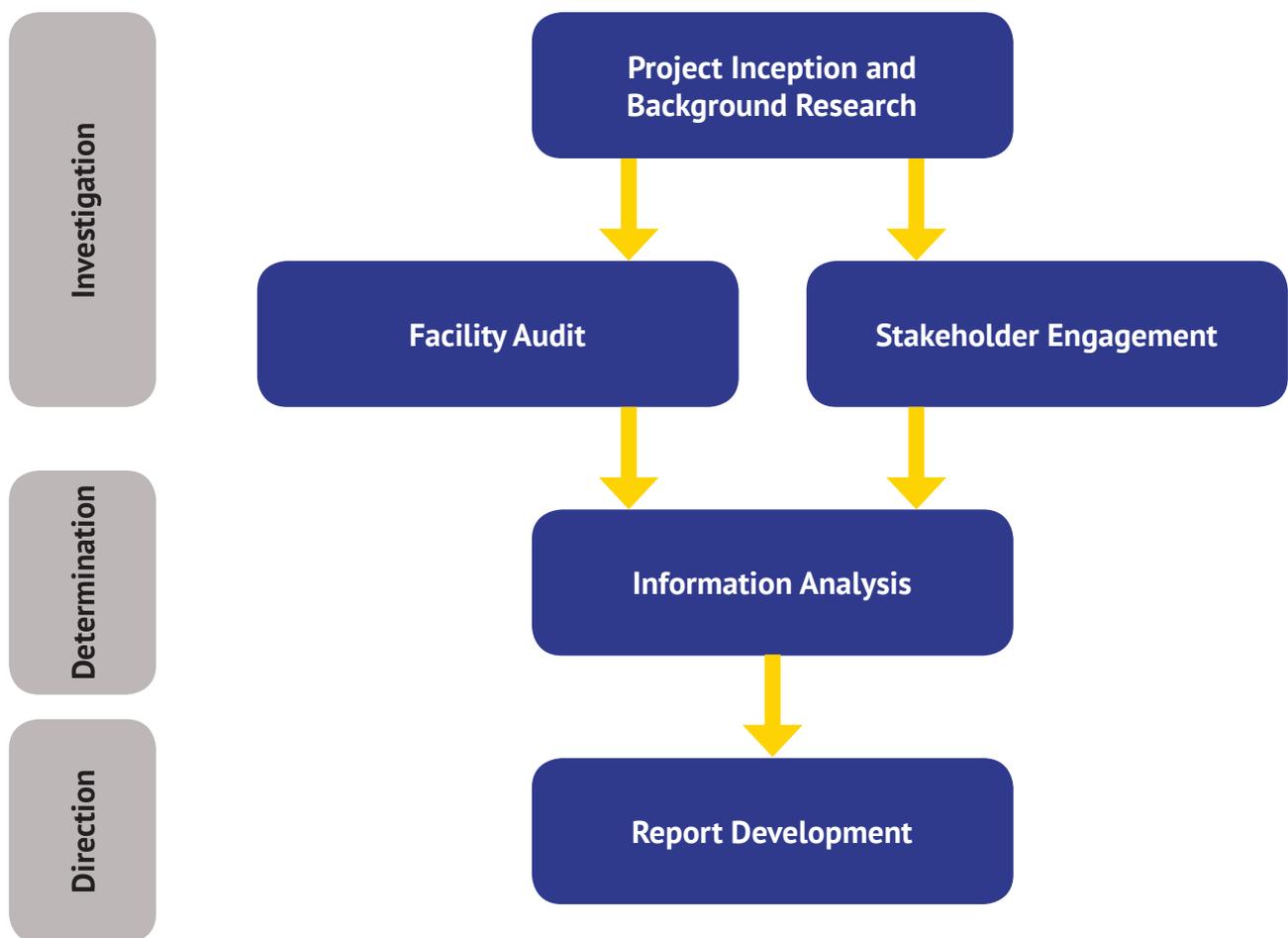


Figure 1: Methodology Stages

2.3 STUDY LIMITATIONS

This study and the recommendations are based on assessment of the available information and advice provided by a number of individuals and organisations. While a comprehensive stakeholder engagement program and investigation of current facilities was undertaken, any project such as this cannot achieve 100% of its engagement goals. Every effort has been made to ensure that the information is current, however some stakeholders chose not to discuss aspects of

indoor facilities provision and planning, others such as commercial operators were understandably cautious in providing information that might be commercial in confidence. A few stakeholders could not be contacted or opted to not be involved. In addition, all information while valid at the time of collection may change over time and so too, will the plans and strategies of some groups.

2.4 INDOOR SPORTS CONSIDERED IN THE STUDY

This study focused on indoor sports and during the study process attempted to contact as broad a range of users as possible. In addition to focusing on the sporting users, engagement also included facility managers to ensure that perspectives on utilisation and availability were balanced.

Peak bodies in the territory were consulted regarding their sports and all sporting groups were able to provide comments via a club survey, contacting the consultants or through Sport and Recreation Services.

The following sports were included in the study:

- › Basketball
- › Netball
- › Volleyball
- › Futsal
- › Badminton
- › Tennis
- › Squash
- › Indoor Hockey
- › Ice sports
- › Roller Sports
- › Table Tennis
- › Gymnastics
- › Martial Arts
- › Fencing



3 SUMMARY OF EXISTING PROVISION AND FUTURE DEMAND

Existing provision in the ACT is a complex mix of commercial, club, school, university and community based organisations. At one level there are a number of facilities which operate commercially to provide full public access and usually have a mix of external hirers and internally managed programs.

At the next level there are a number of multi-user facilities that provide external use subject to internal use demands. Schools and universities fall into this category. Additionally not all public, private or independent schools allow external use and some have a number of challenges in providing for external use. There are also a few commercial facilities that restrict access to club members only.

Compounding the complexity of different facilities and different levels of availability is the mix of design

and playing surface of indoor sports courts which can accommodate different uses. In some cases older facilities no longer comply with contemporary safety (e.g. run off space) requirements.

Apart from school facilities, the ACT Government does not directly own or manage any dedicated indoor sport court facilities. The ACT Government has supported the construction of a number of facilities through a range of grant programs and does have a number of community centres and surplus spaces which are used for some indoor sports such as martial arts and fencing. The existing school facilities vary both in suitability for external use and capacity but in general, government schools support community use.

The supply summary below identifies the different types of playing surface and format currently available

Type	Public/ Commercial/ NGO	Schools (available for use)	Can accommodate	Notes
Indoor Sports Courts (suitable for Basketball and Netball)	35	27	Basketball Netball Volleyball Badminton Futsal Hockey	Woden Basketball Stadium (3courts) will cease operation in 2015. It is also likely that the single court at CIT Woden will be closed. Includes Lyneham hockey and netball centres
Indoor Cricket/ Indoor Tennis Multi use ¹	15		Social netball, Indoor cricket, Indoor tennis, Futsal, Volleyball	Includes Belconnen community centre which is undersized. Includes mpowerdome
Squash	31		Squash	Erindale facilities are included in the “public” column not with schools. Excludes 8 courts that are not publicly accessible.
Gymnastics	5		Gymnastics	Includes AIS
Ice	1 rink		Ice Sports, Broomball, Ice hockey, Figure skating etc.	Commercial Facility
Table tennis	1 centre 5 tables Shared centre 2+ tables		Table Tennis	Includes the Tuggeranong Indoor multi centre (archery)
Other indoor multi-purpose facilities used for recreation and sport	Numerous community centres, halls , church halls	Many schools	Range of other sports: e.g. Fencing, Martial Art, Dance etc.)	This includes properties managed by ACT Property Group (e.g. neighbourhood halls and surplus buildings)

¹ Excludes the ACT Tennis centre as the indoor courts will not be used for anything else

3.1 ADEQUACY OF CURRENT PROVISION

As is the case in any commercial setting, understanding the balance between supply and demand within the indoor sport facility sector is crucial in maintaining the continued viability of venues across the Territory. Based on the engagement with stakeholders (Section 2.5 of the Background Report) and the Investigation of Current Provision (Section 3 of the Background Report) there are a number of issues affecting adequacy of provision including, availability of courts, cost of courts and the configuration (suitability) of courts for various sports.

In an overall sense, an adequate level of provision would mean that all user groups could access the

amount of court hours they would like at a sustainable cost. This is further complicated by peak demand times - those times generally outside of work and school hours when all the various sports are vying for access and when participants most want to be involved. Peak hours are generally between 4 and 9 pm weekdays and depending on the sport at least 1 weekend day.

From the analysis of current provision and use, feedback from sporting organisations, and discussions with venue managers, the following general observations emerge (for more detail please refer to the Background Report):

Table 2 Summary of Stakeholder Feedback on Current Provision

Stakeholder Feedback	Consultant Observations
<p>Most not for profit facility owners/managers (i.e. Basketball ACT and Netball ACT) indicate that their facilities are operating at or near full capacity during peak hours. This is constraining the growth of their sports and provides little opportunity for other user groups to access their facilities (generally smaller sports which rely on hiring space to conduct their activities).</p>	<p>The advice from both commercial and not for profit operators is that most of the existing facilities have none or very little capacity at peak times.</p> <p>In addition, the evidence from sports undergoing strong growth which have a facility owned/managed by their peak body, is that they require almost full usage of their venue which, in turn, displaces other users.²</p>
<p>Commercial venue owners indicated that the viability of their facilities relied on regular and high levels of use, especially during peak times. As with any commercial venture, the introduction of new facilities into the market may jeopardise the future viability of existing facilities.</p>	<p>In exploring the financial viability of any additional commercial indoor facilities, consideration should be given to any possible impacts on existing facilities (both commercial and not-for-profit).</p>
<p>Most court sport organisations (including Squash ACT and Badminton ACT) believe there is a shortage of court hours available for training and social play.</p>	<p>The evidence supports that most facilities are operating at capacity during peak hours.</p> <p>Peak demand is always an issue for facilities which can have empty blocks during the day and no capacity at night. Viability of facilities requires high use in peak times but emerging strategies are expanding use times with social and modified versions of sports suitable for non-peak hours.</p>
<p>Many court sport organisations indicate there is a major shortage of access to multi-court centres that can support sustainable competition.</p> <p>Further to this, a number of organisations including Capital Football (futsal), Basketball ACT and Volleyball ACT believe there is latent demand that cannot be accommodated due to this shortage of available court hours, particularly during peak times.</p>	<p>While there is a reasonable geographic distribution of multi-court indoor facilities, meaning travel times are not a significant barrier, the main growth areas of Molonglo and Gungahlin will require better access.</p> <p>Access to centres with two or more courts is very limited in these growth areas. In addition, provision in the south and near Molonglo will decrease significantly with the closure of Woden Basketball Stadium and Woden CIT courts.</p> <p>Training demand could be accommodated more in single court facilities which could free court hours in multi-court facilities for competition. Increasing the availability and use of school facilities will help considerably.</p>
<p>Formal advice provided to Table Tennis ACT is that their facility at Kingston has reached its end of life and is not worth further investment.</p>	<p>Any further investment in the facility is not recommended. Table Tennis ACT should consider alternative facility options such as becoming a tenant in another indoor facility, particularly one with a configuration unsuitable for court sports but still suitable for table tennis. It is possible a school facility may be able to offer this.</p>

² A good example is the growth of social netball programs at Lyneham centre which has occupied the court hours that futsal once accessed.

Stakeholder Feedback	Consultant Observations
<p>Gymnastics ACT have identified a need for a new facility (or expansion of the existing facility) in Gungahlin and would like to develop a permanent events facility for gymnastics and affiliated sports.</p>	<p>A new club facility to accommodate continued growth is warranted and consideration should also be given to a study to determine if a state/regional facility that could support elite level training/competition is feasible in the ACT.</p> <p>Greater utilisation of school indoor facilities and partnerships with schools to provide club level space should be considered.</p>
<p>The pending loss of three courts at Woden Basketball Stadium and the single court at Woden CIT will exacerbate the shortage of court hours for some user groups.</p>	<p>The closure of Woden Basketball Stadium will displace a number of user groups. There may be opportunity within existing school facilities to accommodate the needs of some of these displaced groups.</p> <p>In addition relocating some training demand from existing multi-court facilities may help free up space for competition.</p>
<p>Ice sports organisations have expressed dissatisfaction with the existing privately owned and commercially operated facility due to aging infrastructure and difficulty accessing sufficient ice time. The growth of their sports is currently constrained and they believe a more modern facility is required.</p>	<p>The ACT is unlikely to be able to support two ice sport facilities. While a single centre is recommended, a more modern and contemporary facility may have commercial appeal.</p> <p>Ice sport organisations and commercial interests should cooperate to investigate possible models for an alternative more modern facility. This investigation should consider the mix of sport, recreational and event needs and explore how newer facility models may be able to address these needs in a commercially viable way. It will also need to investigate possible sources of capital investment.</p>
<p>Squash ACT is concerned that the possible loss of squash courts in the short-term would have a significant negative impact on the sport. In keeping with their strategic facilities plan, Squash ACT believe there is a need for additional courts in Gungahlin to service population growth and that any courts lost elsewhere should be replaced (within the same region).</p>	<p>Although the current provision of squash courts appears to be sufficient to support existing participation levels, additional facilities will be required to meet projected population growth, particularly in Gungahlin and Molonglo.</p> <p>Squash courts in the ACT have historically been provided through the private sector.</p>
<p>A number of other indoor sports such as Roller Derby, Fencing and Martial arts have reported difficulties in accessing space. The combat sports (fencing, martial arts etc.) have far more flexibility with the space they can use and have established a number of solutions that use non-sport court areas.</p> <p>Roller Derby has reported difficulties as they have specific spatial and surface needs that require a large indoor space. The competition for indoor court space impacts on them and has encouraged the sport to seek alternative venue solutions.</p>	<p>One of the Roller Derby clubs has moved to a school facility in Queanbeyan after exhausting identified options within ACT. The other club is investigating leasing in an industrial/commercial area as they will be displaced by the closures in Woden and were unable to find a suitable alternative venue.</p>
<p>There was general agreement from sporting organisations that school indoor courts are an important resource which could make a significant difference to meeting the training needs (and some competition needs) for many sports.</p> <p>Many clubs already use school courts and many others have indicated a desire to use school facilities.</p>	<p>Increased utilisation of school indoor sports facilities, where possible, is the most obvious opportunity to address existing court shortage issues (particularly training activities) for a range of sporting organisations.</p> <p>To achieve this, a number of issues will need to be addressed including security systems, hiring and supervision policies, access technologies, pricing structures and cost of managing community access.</p> <p>In addition, more consideration is required on how to best make the sport and recreation industry better aware of facility availability within the school sector, when space is available and how to increase the ease of booking.</p>

3.2 AVAILABLE CAPACITY WITHIN EXISTING FACILITIES

Analysis of feedback provided by the majority of facility owners/managers and facility hirers demonstrates that *indoor sport facilities are heavily utilised during peak periods*. However, in a commercial setting, operators rely on high usage in peak times to offset slow periods such as during weekdays. It is important that any new facility proposals consider the supply in the existing catchment and do not threaten the viability of existing facilities by “cannibalising” the same market.

Nearly all facilities will have unused capacity in the non-peak times. These low revenue time slots are the perennial challenge for commercial operators. There is considerable innovation by commercial facilities in developing daytime programs for schools, elderly, parents and others that help use capacity. Another trend is the development of social/corporate competitions that run at lunch time or before and after work. All of these help to convert unused hours. However, the fact remains that the peak demand times are going to be between 4.00 and 9 (or 10) pm weeknights and (generally) Saturdays.

Feedback from Education and Training Directorate (ETD) indicates that there is available capacity within some ACT Government schools which could help to address the training requirements of court sports, as well as possibly competition requirements for smaller format sports such as badminton, martial arts or fencing.

To assist in better utilising indoor sports facilities at ACT Government schools, ETD has developed a new policy for community access and usage of these facilities. In the short-term, this policy could assist in facilitating immediate opportunities within existing school facilities to accommodate the needs of current

sporting user groups, particularly those groups which will be displaced as a result of the closure of the Woden Basketball Stadium.

Feedback from some sporting user groups also indicated that lack of information was an issue in accessing existing facilities. Several mentioned the desirability of a central contact point that had details of what facilities were available; what size/space was in them; the cost of hire; and an availability calendar. Improving the ease with which potential users can find venues and check availability would help to increase take up of any available capacity.

Some facilities also reported structural constraints on their ability to increase multiple use or to host events. Issues such as constraints on event parking; design elements which conflict with new sport standards; lack of spectator space; poor player amenity; and constrained sites were all raised.

Existing facilities and their current level of utilisation is discussed in more detail in Section 5 of the Background Report.

There is very limited excess capacity in any multi-court facilities. The loss of four courts at Woden (Woden Basketball Stadium and Woden CIT) and the indication from sports that there is unmet demand, means that overall there could be an undersupply. However some facilities, such as schools, could be used more, particularly to meet training demands. Planned facilities such as the indoor cricket centre at Gold Creek will help meet some demand but ultimately demand from population growth in Molonglo, West Belconnen and Gungahlin cannot be met with existing facilities.

3.3 FUTURE DEMAND

Based on the analysis undertaken in Sections 4 and 5 of the Background Report and in consideration of both expressed and modelled demand, the following facility provision is desirable for 2015, 2020 and 2030. The provision of facilities could be the result of a number of

strategies including the encouragement of commercial provision, partnership projects and direct partnerships between schools and sports. All proposals would need feasibility and business case analysis.

Table 3 Summary of Additional Facilities Needed

Facility	Current Needs	Additional by 2020 Growth approx. 30,000	Additional by 2030 Growth (20-30) approx. 64,000
Indoor Sports Courts	At least 1 new 3+ court commercial indoor centre. in Gungahlin Additional courts to replace loss of 4 Courts at Phillip ³ or release of capacity in other facilities to accommodate the displaced uses.	1 new 3+ court commercial centre in Molonglo Design and construction of new indoor facilities at government schools to support community use through multi-purpose design and provision of storage for users.	1 new 3+ court commercial centre to be located in a growth area where feasibility has been tested. The provision of community accessible facilities at schools in Gungahlin, Molonglo and possibly West Belconnen will augment supply.
Squash	Current provision meets the needs of the sport	2-3 new courts as part of a commercial facility.	3-4 additional courts as part of commercial facility. Alternately a new 6-8 court centre as part of a large commercial sport and recreation centre could be more viable than two smaller ones.
Gymnastics	Current unmet demand might be accommodated with expansion of existing facilities and the increased use of school facilities.	A new club facility to service growth areas is warranted. Consideration should be given to development of a state/ regional competition and training facility	Depending on capacity of expanded or new facilities a further facility may be required. Further development of school-gymnastics partnerships may meet increased demand.
Table Tennis	Needs being met but current facility at Kingston at "end of life".	Table tennis could be located as a permanent tenant at another facility while also securing regular access to secondary spaces including school halls.	Includes AIS
Ice Sports	Existing privately owned commercial facility considered inadequate by Ice sports. Their preference is to replace with a modern ice facility better accommodating multiple sports and ice sport events.	Ice sports to should be encouraged to explore private investment and redevelopment opportunities. The ACT Government should consider any genuine business case from ce sports and the market that may result in an improved facility for ice sports being developed.	

³ Woden Basketball Stadium and CIT)

Facility	Current Needs	Additional by 2020 Growth approx. 30,000	Additional by 2030 Growth (20-30) approx. 64,000
Other Indoor Sports	Most have sufficient access to facilities for current demand. However, Roller Derby has struggled to secure ongoing suitable facilities. One club moving to a Queanbeyan school and the other looking for a lease space in commercial/ industrial areas.	Additional capacity will be needed in line with population growth. This can probably be serviced with access to other indoor and multi-use spaces and use of current and future school centres. With the exception of roller Derby many of these sports are able to share facilities or be “permanent” tenants in part of larger facilities. Design of future indoor facilities at schools may want to consider suitable dimensions for Roller Derby	Additional capacity in line with population growth will be needed and demand can be spread through existing and future school and other indoor facilities.

3.4 FUTURE DEMAND

Under Construction

1. Coombs School (Molonglo) - two indoor courts, including community storage areas will be delivered as part of this new primary school. Construction of the school is expected to be completed ready for the start of 2016 school year (February 2016).
2. National Convention Centre - The ACT Government has purchased a portable basketball court surface to support elite level basketball (WNBL - Canberra Capitals) being played at the National Convention Centre Canberra in 2015. This will provide an additional mid-size show court to complement the AIS Arena.
3. Gold Creek Country Club (Nicholls) - A commercial indoor facility with three synthetic grass courts is under construction. Given the commercial nature of the facility, it is unlikely to offer any access for peak body competition delivery (i.e. Capital Football and futsal). The facility is expected to be completed in 2016.

Confirmed – Construction Yet to Commence

4. Belconnen Basketball Centre – Basketball ACT has confirmed it will add two outdoor courts to complement existing indoor court provision at the facility. Construction is expected to commence in 2016. They have also expressed an interest in developing additional indoor courts in the future.

Proposed Facilities

5. Preliminary planning activities for the Stromlo Leisure Centre have considered the potential provision of 3 indoor courts as part of this future facility.
6. Capital Football has been negotiating with EPIC regarding potential access to the Coorong Building which, in the past, was utilised as a 3 court basketball facility. This facility would need some refurbishment to be functional for futsal competitions, but does provide an interim solution to address some of the demand requirements for the sport, but the demands of event use at EPIC means that several interruptions through the year will occur. EPIC has identified a ten week period to host the futsal games, however, set up and set down work will be required to enable contracted events on the weekend during this period.
7. Capital Football's long-term facility solution for futsal is a purpose built 3-4 four court facility. This is consistent with the recommendations provided in their Strategic Facility Plan. Any planning for this facility will need to consider the ideal facility configuration (indoor and outdoor courts), location, cost, funding model and implications for existing facilities.
8. The University of Canberra is reviewing plans for expansion of their sports centre to add 4 more indoor courts and additional squash courts. Prior funding commitments for this facility were rescinded due to the change in federal government. However it is understood the University is actively exploring options to pursue the expansion.

3.5 FUTURE FACILITY DESIGN CONSIDERATIONS

The design and development of leisure facilities has undergone significant change over the past two decades. The primary focus of contemporary facilities is now on expanding the facility mix to introduce multiple attractors to the community, including frequently, a combination of 'wet' and 'dry' options.

The financial sustainability of indoor leisure facilities is challenged by increasing service expectations in an environment where State and Federal government funding opportunities are scarce. The composition of facilities is concentrating on those elements that encourage 'year round' access, longer stays and higher returns. This means that commercial facilities increasingly seek to have strong returns on the space within their centres. Social sport, fitness, gyms and wellness programming are all part of this strategy.

There is a noticeable trend in Australian leisure facility design and operation towards the integration of a wider range of expanded leisure facility services, such as café, merchandising/retail, health and fitness centres, wellness, multi-purpose indoor sports courts, multi-purpose program spaces and meeting rooms.

In particular, kiosks are expanding into cafés and becoming features of leisure facility design with modern décor and menu choices encouraging greater secondary spending and attracting external patronage. Further, self-service style menu options, supported by effective design, are becoming more popular to service the casual user of these facilities. This results in reduced operating costs from minimising the reliance on 'front-of-house' labour.

The combination of facilities into one integrated venue provides synergies in use and the potential for cross marketing between activities, whilst also providing a major focus as a leisure destination for the community. This can result in increased throughput and activity at the venue and improved financial performance.

More detail on contemporary facility design trends, and trends in provision and management are contained in Section 2.3. of the Background Report.



3.6 POTENTIAL INDOOR SPORTS FACILITY DELIVERY MODELS

Apart from schools and community centres, The ACT Government has typically not been involved in the provision and management of dedicated indoor sport facilities in the ACT. The provision of facilities has been largely driven by the market – either by sports or commercial entities.

While the commercial operation of facilities has generally shown to be a sustainable approach, management by sporting organisations has generally had mixed results with some successes and some failures. These historical approaches should not rule out

the ACT government considering future opportunities to develop and manage a contemporary centre "in-house" should the market fail to address any identified shortfalls or if the business case demonstrates strong viability. A number of major cities have now developed and self-manage new, commercially focused, facilities and have proven the viability of this model.

There are a number of possible provision models which can be considered. These are summarised in the following table:

Table 4 Potential Provision Models

Provision Model for Future Indoor Sport Facilities	Description	Existing Examples	Future Opportunities
Full Private Investment	Facilities built, owned and operated by the commercial sector.	Kaleen Indoor Sports Centre, mpowerdome	Demand/market driven.
Full Government Investment	Dedicated sporting facilities managed directly by the ACT Government or via a third party management arrangement.	This model has not been adopted in the ACT for indoor sport facilities (but currently operates for a number of aquatic/leisure facilities).	Preliminary planning activities for the Stromlo Leisure Centre have considered the potential provision of 3 indoor courts.
Full Government Investment – School-Community Facilities	Facilities integrated and managed as part of ACT Government schools.	Most ACT Government schools have an indoor facility capable of hosting community sporting activities.	Additional school facilities to be constructed in Gungahlin, Molonglo, and potential new facilities in West Belconnen will augment supply.
Government / Private Partnership	Standalone facilities funded or co-funded by the ACT Government which are owned and operated by a third party (commercial partner or a sporting organisation).	Belconnen Basketball Stadium. ACT Netball Centre. Belconnen and Woden Gymnastics Centres.	Purpose-built futsal facility. Expansion of capacity at existing facilities.
School- Sport Partnerships	Partnership between public or private schools and a sport to invest in a facility or for the sport to become a permanent tenant paying market rent.	No ACT examples but model is successful with gymnastics in other states.	Planning for new schools in growth areas.

3.7 DECISION MAKING ON FUTURE FACILITY PROVISION

Determining the best delivery model for any future provision of indoor sports facilities requires consideration of a number of factors and should be undertaken on a case by case basis. Key considerations are:

- ▶ The most cost effective provision of multi-purpose indoor sport centres is usually a commercial multi-court facility provided as part of a large multi-use facility (e.g. aquatic, fitness and indoor sports).
- ▶ Indoor centres are far more viable over time if they are designed to accommodate a range of uses and can be responsive to market changes and changing participation trends.
- ▶ Contemporary design for successful commercial leisure centres includes a range of activity spaces and expanded services such as cafés and allied health services.
- ▶ Single-purpose (e.g. sport owned/ managed) facilities require a business case analysis to ensure they are viable over time and that the organisation has the capacity to manage the facility sustainably.
- ▶ Increasing provision may be more effectively achieved in some locations through upgrading of existing facilities.
- ▶ The viability of indoor sport facilities relies on being able to service a specific catchment. Planning for new facilities needs to consider other facilities servicing the same catchment and should be wary of over servicing which can impact on the viability of existing and proposed facilities.

If the ACT Government is considering a partnership in the delivery of any future dedicated indoor sport facilities (excluding schools), the following core issues need to be considered:

- ▶ Any investment of public funds in provision should be on the basis of verified feasibility assessment that ensures a sustainable operational model.
- ▶ Feasibility assessment should consider the potential catchment for a proposed facility and if there will be negative impacts on existing centres. The cumulative impact of concurrently funded and potentially competing facility projects needs to be balanced against the existing and projected future demand.
- ▶ Market sensitive management such as commercially operated facilities should generally be preferred. However, there may be circumstances where the cost of land or capital could be a barrier to a centre progressing. In these cases partnerships involving some public investment may be the best solution to meeting community needs.



When considering options for provision of a new facility the following questions should be explored:

Table 5 Key Questions when Considering New Facilities

Questions	Additional Considerations
<p>Can a commercially operated multi-purpose facility servicing a range of sports provide sufficient access for all stakeholders in a cost-effective manner?</p>	<ul style="list-style-type: none"> ➤ Commercial viability relies on sufficient catchment, and good location. ➤ Commercial management will often be more responsive to changes in market demand and operate more efficiently. ➤ Commercial management will prioritise financial return on “space” and meeting needs of multiple sports can be challenging in peak times and may displace those sports which offer lower returns. ➤ Sporting groups pay access fees as a user which removes them from needing to manage and maintain facilities. ➤ Current trends in other jurisdictions suggest larger multi-purpose facilities have a better chance of being commercially viable.
<p>Does development of a smaller facility designed predominantly for a single purpose offer a more sustainable outcome in meeting the needs of that sport?</p>	<ul style="list-style-type: none"> ➤ The provision of centralised commercially operated facilities is often not the preferred model from an individual sport perspective as this does not give them the opportunity to control their own destiny, nor reap the rewards from any potential profits. ➤ Strategically, many sports aspire to be an asset owner with the vision that this may present an opportunity to create a revenue stream to support the construction of future additional facilities. ➤ Sports should develop a comprehensive business plan, which considers the full asset life cycle, before venturing down the path of direct asset ownership to ensure the proposed vision does not jeopardise the future viability of the organisation. ➤ While many sports are good at managing their sport, they do not necessarily have the skills and experience to manage facilities sustainably. ➤ Many sports have volunteer committees and boards which change regularly and consistency of management can be a problem. ➤ For some sports the configuration required makes sharing very difficult and this can add weight to a self-managed facility.
<p>Can additional demand be met through expanding existing facilities, rethinking how space is provided or are new facilities required?</p>	<ul style="list-style-type: none"> ➤ In more established regions with a variety of indoor sports facility provision, any investigation of additional provision needs to consider if it is more beneficial to provide a new facility or to expand existing facilities. ➤ Opportunities to increase access to existing facilities should always be explored – such as the ongoing liaison with Australian Institute of Sport (AIS) to understand if the Commonwealth Government’s Winning Edge Strategy may provide future opportunities for local community sporting organisations to access and utilise indoor facilities at the AIS campus in Canberra. ➤ Planning for any new facility should consider if lower cost options to meet the combination of training and competition needs can deliver the same outcome with lower capital and operating costs. For example; many court sports could operate with a mix of indoor and outdoor court provision (including covered outdoor courts).
<p>If the ACT government is considering supporting or investing in a facility, has a feasibility assessment indicated the proposal as the best option?</p>	<ul style="list-style-type: none"> ➤ Any investment of public funds in provision should be on the basis of verified feasibility assessment that ensures a sustainable operational model and that the investment is not at risk of poor management or failure. ➤ Feasibility assessment should consider the potential catchment for the proposed facility and if there will be negative impacts on existing facilities and their viability. ➤ Investment in partnership projects should ensure that community access cannot be diminished significantly by changes in management approach or corruption of purpose to more commercial uses which disenfranchise the original users the facility was intended for. ➤ If a centralised (commercially operated) multi-sport facility is delivered, then caution is needed before considering development of further competing facilities (either by the market or with government investment) within the same catchment. ➤ Detailed feasibility is required so that projects are not “funded to fail” due to insufficient utilisation caused over supply within a catchment or inadequate venue management skills within an organisation. For example; careful consideration would be needed if the proposed University of Canberra project, Basketball ACT project and Capital Football (futsal) project all proceeded within the same catchment.

4 RECOMMENDATIONS

4.1 INCREASE COMMUNITY USE OF INDOOR SPORT FACILITIES AT SCHOOLS

4.1.1 Rationale

School courts are an underutilised resource. They offer a good solution to meeting demand for training space and, for some sports, can support competition.

A number of factors influence the current level of use of school facilities, the critical ones being:

- › Lack of awareness of the availability and capacity of school facilities.
- › Sports unsure of who to contact or how to investigate access.
- › Perceived barriers to access such as “complicated” booking procedures.
- › Different approaches to community use between campuses and different charging and use regimes.
- › Design and legacy issues making it difficult for schools to enable external use.
- › Pricing frameworks and cost of operation for schools.

Access to courts at reasonable prices for training, is one of the biggest issues for indoor sports. Feedback from many sports suggested that the main perceived barriers to increased use of school facilities was a lack of knowledge of what was available and who to contact to access facilities. Other issues cited included hourly hire rates that were well above market average and a perceived reluctance at some schools to allow external use.

Education and Training Directorate have recently released a new policy encouraging community use of school facilities and have also made an on-line inventory available to make finding a facility easier.⁴

There are many public and private schools that allow community or club use of their facilities. For the schools, there are a number of challenges in making community access available. Older campuses may not be designed in a way that makes access easy, the building design may be such that it requires staff members to be present and organisational approaches to cost recovery may mean that pricing for access is not equitable with the market.

Indoor courts at schools are increasingly being planned and recognised as a whole of community resource. Recent new school developments have identified the opportunity for school sporting and other facilities to be integral to efficient community provision solutions. Harrison School which provides two indoor courts for school and community use is a good example of what can be achieved with modern campus design enabling community use.

There have also been successful hybrid approaches such as Erindale Active Living Centre which has seen a commercial-school partnership in provision that ensures high quality contemporary facilities are available to all the community without unsustainable subsidy levels being required. A number of other partnerships could be pursued, particularly with establishing “resident” sports that ensure use of facilities as well as offering young athletes more pathways integrated with secondary education. Examples are discussed in the report and appear to indicate a strategic opportunity for the ACT.

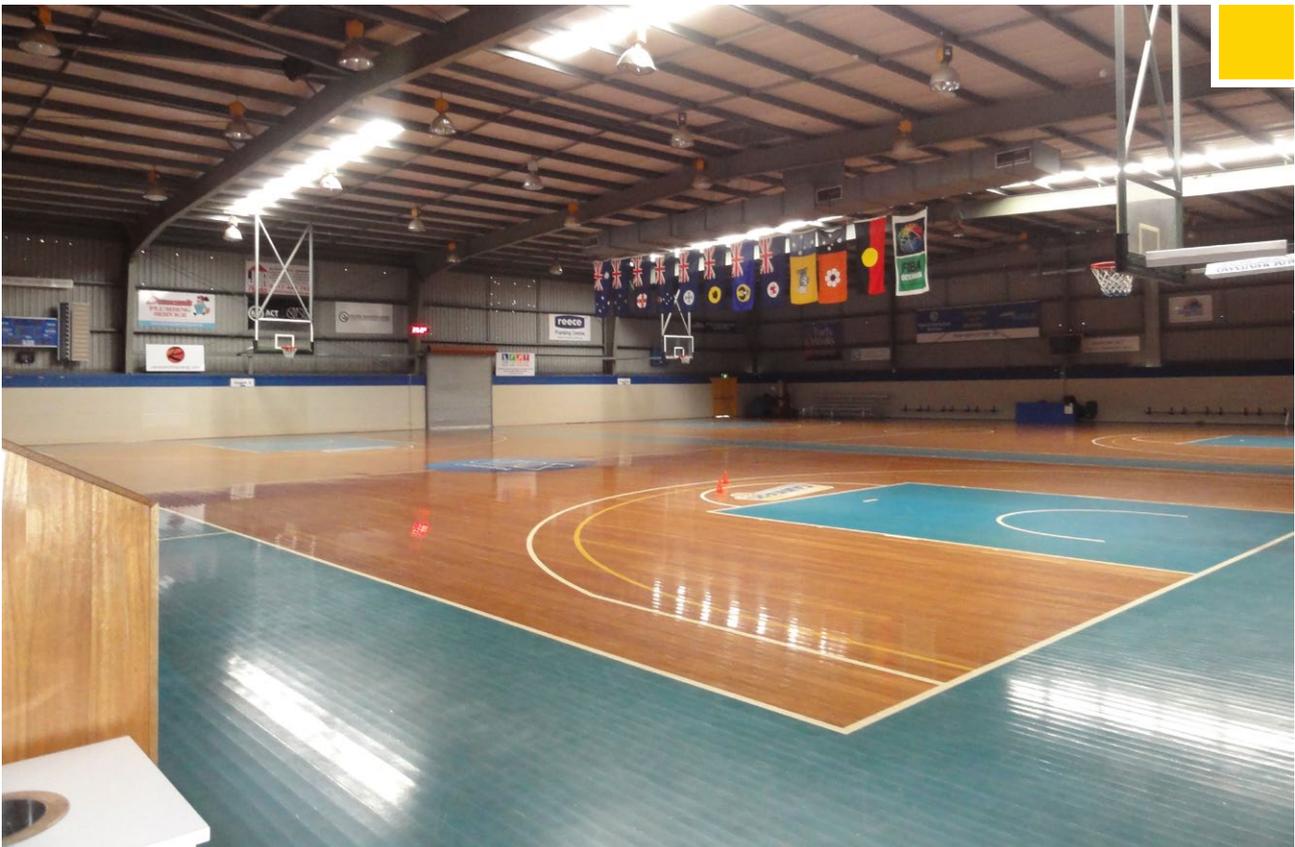
A critical issue is that funding for the operation of school sporting facilities, including indoor courts, should include the recognition that they have a role in community provision. The access and pricing regimes applied should take a “whole of government” approach and aim for full community use as well as reasonable level of cost recovery.

Establishing a more “market friendly” approach will not only increase access for the community, it will provide a more effective revenue stream to help offset the cost of maintaining facilities and will reduce demand for additional courts. By increasing use of school facilities for training and some competition, the need for additional courts to be provided in other public centres can be reduced to that of a few larger multi-court centres.

⁴ Available at the following link: http://www.det.act.gov.au/about_us/A-Z

4.1.2 Strategies

1. An integrated policy should be developed that combines both education and sport and recreation provision and seeks to ensure that all public school indoor sport facilities are made available for public use where feasible. This policy should also look at implementation mechanisms critical to success such as:
 - a. Providing a central and easily accessed, point for information on available spaces and available hours. A central web based booking system could be explored. Critical information will be the size and configuration of a facility, hire fees and availability.
 - b. The introduction of an appropriate subsidy scheme to offset costs associated with the hire of school facilities to ensure hire rates in schools remain competitive with other commercial indoor facilities.
 - c. Funding upgrades to existing school facilities to resolve access and other operational issues so that facilities can support greater levels of community access outside of school hours.
 - d. Amendments to relevant grant programs (i.e. Sport and Recreation Grants Program) that may support funding for school – sport sector partnerships to upgrade school facilities.
2. The opportunity to create vibrant and active community hubs based around schools should continue to be pursued. Campuses should be designed with community use of sporting and other facilities planned “up-front”.
3. Priority support to access school facilities should be offered to user groups who are being displaced with the closure of the courts in Woden.
4. Opportunities to partner school campuses with provision of indoor sport centres serving the school and local community should be pursued along with the potential to establish “resident” users who will use facilities out of school hours and could manage community hire and use as part of their agreement. Further work is recommended to develop a set of tenure/ partnership options to progress this.



4.2 ENSURE NEW MULTI-COURT FACILITIES ARE PROVIDED TO SERVICE GROWTH AREAS

4.2.1 Rationale

Currently several sports are reporting difficulty in accessing courts for training and challenges in accessing multi-court centres suitable to host competitions. For many of these, a minimum of two courts, preferably three or more, is required to be able to run social or club competition in a sustainable way, at a competitive price.

Many sports have also identified the rapid increase in interest and participation in, social modes of their sports. In other words, the growth areas seem to be in “pay, play and away” competitions that require nothing more than paying a fee and turning up to a game with your team. The traditional club focused model of competition that relies heavily on volunteers and ongoing involvement in club activities is now being complemented by this growing sector. For many sports, the rising popularity of social sport has provided an opportunities for increased revenue and expansion of their participation base. But, it has also presented challenges as accessing court space to take advantage of growing demand, particularly in peak hours, has become problematic for many sports.

Many sports such as Basketball, Futsal and Volleyball believe there is latent demand for participation that cannot be met without access to additional court spaces. Across Canberra it is clear there is very limited spare capacity in any multi-court facilities. This will be compounded with the loss of the courts from the old Phillip 3 court centre and the pending loss of the court at CIT Woden.

The major population growth areas of Molonglo and Gungahlin should be the focus of future provision planning, and longer term consideration is needed of provision options for West Belconnen and areas where significant medium- high density population growth is planned.

Analysis of provision standards and rates of provision in Qld, NSW and Vic (see Section 4.3 of the Background Report) has suggested that population growth to 2030 would generate demand for another 10 courts. Demand analysis based on current participation rates as reported through ABS data (see Section 4.2 of the Background Report) has indicated that another 7 courts could be required. This participation data does not adequately capture the current trends in increased participation, particularly in social sports. As previously discussed provision of single stand-alone courts will not adequately address demand.

With an existing population of 65,324 and continued growth of nearly 30,000 additional residents by 2040, there is a strong case that a commercial multi-court facility will be viable in Gungahlin. Existing and future demand will, in part, be met by the proposed indoor cricket facility at Gold Creek and access to school indoor sports courts. However, the provision of a three court facility as part of an integrated (and sustainable) leisure centre should be encouraged.

As already determined in the facility study for the leisure complex at Stromlo there is a strong case for indoor courts as part of the leisure and aquatic facility. The combined mix of facilities will create a more vibrant and viable facility. However timing will be critical and it is recommended that the indoor courts be provided when the local population reaches a threshold that will support the courts.

4.2.2 Strategies

1. Ensure maximum use of school facilities to meet training (and some competition) demand, while progressing plans for a few well planned and sustainable 3+ court centres provided as part of major mixed use leisure centres. New centres should be commercial or partnership/ hybrid models based on a feasibility analysis that demonstrates viability.
2. Encourage the development of a 3+ court facility in Gungahlin. Based on the current demand and emerging models of sustainable centres, a commercial facility combining a number of uses to diversify revenue opportunities will be successful. This facility could be provided in partnership with a school, commercial agency or community based organisation and ideally would be operational by 2020.
3. Retain the 3 indoor courts at the Stromlo Leisure Centre that were proposed in the original feasibility study.
4. Consider opportunities in smaller growth areas such as West Belconnen to develop commercial or semi-commercial two court fitness and leisure facilities in partnership with a school campus.

4.3 INVESTIGATE SUSTAINABLE OPTIONS FOR INCREASING CAPACITY AT AND USE OF, EXISTING CENTRES

4.3.1 Rationale

Before considering capital investment in new facilities ACT Government should encourage sustainable expansion of existing facilities that helps to meet current unmet demand and future growth. Increasing use of schools is one strategy, similarly there are other facilities managed commercially, by institutions or community groups that could contribute to this solution.

Currently there are a number of proposals to provide additional court space at multi court centres: Belconnen Basketball Stadium is proposing to add two new outdoor courts with further plans to add indoor courts. The University of Canberra previously have indicated a desire to expand the leisure centre with additional indoor sport and squash courts.

Capital Football is negotiating to use the Coorong centre at EPIC and provide a base for Futsal. The use of the 3 courts at EPIC is an ideal interim solution that will provide time for more planning to be undertaken in regard to Capital Football's proposal to establish their own futsal centre. The use of the courts at EPIC will also free up court hours elsewhere and help to address unmet demand from other sports.

In the short term, the loss of the 3 court facility at Phillip may be offset by use of EPIC, as the transfer of futsal demand from other centres to EPIC could free up court hours for other sports. However, growth in participation may quickly consume this new capacity.

There may also opportunities for a hybrid provision model (such as Erindale Active Living Centre) which meets school and community needs via a public private partnership. In addition the recommendations regarding school facilities and increasing use could help with training demand and possibly free additional hours at existing multi-court centres.

Additionally, options which expand the capacity and capability of school facilities may be a better outcome than developing new facilities. Providing a second court as an indoor court or even a covered court to complement an existing school court could be enhanced with investment in access and management technology to improve ease of community use. This would benefit school users and the community.

In some cases commercial facilities may have the potential to improve capacity but are constrained by planning or other issues. Providing support for the

venue managers to negotiate through these constraints may not require any significant resource commitment from the ACT government and could deliver improved opportunities for sports.

4.3.2 Strategies

1. Support the interim use of the centre at EPIC by Capital Football as a futsal and court sports centre.
2. Encourage the University of Canberra to pursue their plans to expand their current sports facility, particularly additional indoor sports courts and additional squash courts. However, the final facility mix and number of new courts provided should be considered in the context of supply within the greater Belconnen catchment.
3. Basketball ACT should be encouraged to continue planning the expansion of courts at their centre, however there is a concern that with indoor courts, both the University and Basketball ACT would be competing for the same catchment.
4. While Capital Football is using EPIC they should be encouraged to continue their investigation into feasibility and funding models for a longer term solution that provides a 2-4 court futsal centre managed by Capital Football as per their strategic facilities planning. Capital Football may also wish to explore partnering with a school campus or conversion of a disused lawn bowls facility.
5. When Futsal ceases use of EPIC, the level of demand for indoor court space (at that time) should be assessed and if unmet demand exists there should be consideration of establishing another regular sporting user for the space.
6. The ACT Government should continue to liaise with Australian Institute of Sport (AIS) to understand if the Commonwealth Government's Winning Edge Strategy may provide future opportunities for local community sporting organisations to increase the usage of indoor facilities at the AIS campus in Canberra

4.4 ENSURE THAT ALL NEW FACILITY PROPOSALS OR PROPOSALS FOR EXPANSION OF EXISTING FACILITIES ARE TESTED FOR VIABILITY AND SUSTAINABILITY

4.4.1 Rationale

It is critical that proposals for new or expanded existing facilities consider the long term sustainability of the facility and the cumulative impacts on the surrounding catchment. If too many facilities within a catchment undertake expansion this could lead to oversupply and subsequent failure of the business case at one or more of the facilities. In addition the capacity of groups to manage an expanded facility should also be confirmed.

The Background Report discusses several issues associated with viability and sustainability of existing and new facilities and highlights the need to be assured of success for planned facilities, particularly where public funds are being requested to support the venture.

Sustainability of organisations is linked to both their capacity to manage a facility and to the validity of the business case behind a new facility venture. It is not uncommon for sporting groups to overestimate both the revenue potential of a facility and their capacity to effectively manage an asset and a business.

Commercial operators are generally experienced in the market and have undertaken a detailed feasibility before they commit to any new venture. This feasibility will look at both the current demand as well as the likely market conditions into the future, including competing facilities. The same rigour should be applied to any proposal even if it is a club facility. Capital investment means recurrent cost, and any venue manager has to be sure they can fund that recurrent cost.

While, the ACT Government should not be in the role of providing detailed business advice, they should also be cautious in supporting or encouraging proposals that have not demonstrated sufficient rigour in the development of a business case or feasibility.

Good facility design makes a significant difference to viability and creative and innovative approaches that consider both long term flexibility of use and efficiencies in construction and operation should be encouraged. For example, a multi court facility could be configured with some outdoor covered courts to help meet peak demand. This would reduce capital costs and the lower operating costs from passive lighting, natural cooling and lower maintenance will improve viability.

4.4.2 Strategies

1. Any future provision of indoor sport facilities in Belconnen will need to strongly consider the overall catchment demand and sustainability of facilities, particularly as existing facility owners such as Basketball ACT and University of Canberra have aspirations to expand facilities.
2. Any future indoor facility should, to the extent possible, be designed to accommodate a broad range of indoor sport and activities. Design should include consideration of hybrid models which include outdoor or covered court space to cope with peak demand and reduce capital and operating costs.
3. That Sport and Recreation Services develop guidelines, including feasibility criteria, to assist in the assessment and prioritisation of indoor sport facility proposals where government assistance is being sought by a proponent. This should be based on the questions and issues identified in Section 3.6 of the Summary Report.
4. No financial support for new or expanded facilities should be provided without a feasibility study.
5. The capacity on any organisation to manage a facility sustainably should be a critical consideration when considering requests for financial or other support to develop new or enhance existing facilities.

4.5 ENCOURAGE SUSTAINABLE PROVISION OF SQUASH FACILITIES AT THE CURRENT LEVEL

4.5.1 Rationale

Squash has traditionally been provided in commercial or club operated centres. However, emerging approaches to provision indicate that standalone squash centres are only viable if they are major regional centres with 8+ courts or are provided as part of a “multi-offer” venue incorporating a range of facilities and programs. In some cities multiple use of squash courts for fitness and other modified sports has been adopted to increase return on the space which is better for centre viability but still has the effect of reducing available court hours. Commercial operation and return per m² of floor space has also meant that alternative uses such as fitness has seen squash courts converted.

Squash has indicated that the sport cannot afford to lose any more courts and that there is currently little capacity to accommodate additional demand arising from population growth. There are indications of unmet demand and increasing participation in social and fitness squash.

Analysis of future demand identified that around 6-8 new courts would be required by 2030 based on current rates of participation. Logically any new court provision should be focused on major growth areas and should be included in planning for multi-use commercial facilities. This suggests that Gungahlin may be a good candidate.

The University of Canberra’s plans for expansion of its leisure centre may include squash courts which would assist in meeting future demand and possibly address loss of courts elsewhere. Providing additional squash courts at the University of Canberra would be a sustainable and effective solution by expanding an existing facility and creating a higher capacity squash hub in an established location.

4.5.2 Strategies

1. Encourage the University of Canberra’s plans to include additional squash courts in the expansion of their centre. If sufficient courts are added to that facility to create an 8-10 court centre then additional courts are not likely to be needed in Gungahlin.
2. Should the University expansion not include a minimum of 4 additional squash courts then consideration should be given to encouraging 4-6 courts to be included in the facility mix for a future leisure facility in Gungahlin.
3. If any existing courts are lost, strategies for replacement should consider the sustainability issues discussed in Recommendation 4.4. Development of a few stand-alone courts as part of a smaller centre is not recommended.

4.6 ENCOURAGE ICE SPORTS TO DEVELOP A FUTURE FACILITY STRATEGY

4.6.1 Rationale

The existing facility at Phillip is part of a privately owned, commercially run, ice and pool centre. It is an aging facility and needs to remain financially viable. The current Territory Plan requires any use on the existing location to include pool and ice facilities and this could act as a constraint to any alternative provision strategies to be investigated.

Ice sports have indicated that they feel the existing facility is constraining growth in their sports and that its age and limited amenity constrains opportunities to host events.

Ice rinks are usually privately run commercial facilities and increasingly are part of mixed use facilities operating to support a number of programs, ice sports and ice events. Emerging technology means that temporary ice floors to support events are more feasible and therefore occasional large events can be accommodated in entertainment and convention centre venues. Alternatively, “covering” of ice space to create other indoor uses is also now more practical.

The current evidence is that Canberra can only support a single commercial centre. Ideally Ice sports would like to see a modern two rink centre in Canberra. Providing a new or upgraded facility would rely heavily on demonstrating a sustainable mix and strong use by existing and future Ice Sports. It is only with some detailed investigation as to costs and options and the likely commerciality of any proposal that a long term solution will be developed.

4.6.2 Strategies

1. Ice Sports should develop a cooperative approach with commercial interests to investigate potential alternatives to the current aging facility. This investigation should consider the mix of sport, recreational and event needs and explore how newer facility models may be able to address these needs in a commercially viable way.
2. The provision of Ice facilities is unavoidably linked with Canberra’s Planning Scheme and the caveats on the current site to provide ice and swimming. The ACT Government will need to be engaged in any investigation of facility options to ensure that the range of options is not constrained by this linkage.



4.7 INVESTIGATE OPTIONS FOR IMPROVING PROVISION OF GYMNASTICS FACILITIES WITHIN CANBERRA

4.7.1 Rationale

Gymnastics ACT has identified the need for additional capacity in Gungahlin and a facility to address the growth in demand expected from Molonglo. They have also identified a need for a “State” facility that can support club activities, host events and support affiliated sports. Growth in the sport is being hampered by lack of facilities or lack of access to suitable space for participation level programs.

The demand modelling and analysis undertaken in Sections 4 and 5 of the Background Report confirmed the need for at least 1 additional facility as Canberra grows. Areas such as Molonglo / West Belconnen, which will have a family dominant demographic, should be considered as a new facility would be expected to be very viable in this catchment.

Analysis also highlighted that provision of Gymnastics venues is significantly lower in the ACT compared with Queensland and there may be sufficient latent demand for additional clubs to be established. There are a number of examples of successful school-gymnastics partnerships in facility provision and it is recommended this direction be pursued to address the need for more club facilities.

4.7.2 Strategies

1. Gymnastics ACT should work with the current provider in Gungahlin to commence planning for the establishment of a larger gymnastics facility. With the growing population catchment it is expected that any gymnastics facility will be well patronised and have strong viability. The inclusion of gymnastics could be considered as part of a future mixed use facility in Gungahlin.
2. The investigation of school partnership models is recommended for gymnastics facilities. This approach may ensure provision in the growth areas such as Molonglo and Gungahlin. It is possible that a permanent gymnastics facility could be associated with a school indoor sports centre that allowed for event use creating an opportunity for an efficient model of providing Gymnastics ACT with a full time centre with access to event space as needed.
3. Gymnastics ACT and ACT Government should consider undertaking a feasibility study for the development of a state level facility suitable for hosting major competitive events as well as being the base for gymnastics and allied sports.



4.8 ENSURE THAT SMALLER AND EMERGING INDOOR SPORTS ARE SUPPORTED TO FIND SUITABLE LOCATIONS FOR TRAINING AND COMPETITION

4.8.1 Rationale

There are a number of other indoor sports including, table tennis, badminton, roller sports and combat sports that have unmet specific facility needs or are facing loss of their current venue. Many of these can operate effectively sharing space with other users and some have less stringent height requirements than the larger court sports or gymnastics. The difficulty for many of these is finding information on potential (and affordable) venues and gaining security of tenure that allows them to develop their sport around consistent schedules.

Emerging sports such as Roller Derby have potential for growth but have struggled to establish a permanent home for the sport. One of the two clubs in Canberra unsuccessfully searched to find a location focusing particularly on school facilities. They have now secured an agreement with a school in Queanbeyan as permanent tenants. The loss of the courts at Woden and CIT impacted on the other club which has been unable to find alternative venues and is now investigating the feasibility of leasing a shed in a commercial district.

The “home” of Table Tennis is an existing facility at Kingston with an extremely limited remaining life. However Table Tennis do not have the funds for construction of a new facility, nor is it certain that the current location would be suitable for any new purpose built facility. The sport will have some growth and demand could be accommodated within a single large facility as a regular user. It would be better for the sport to only operate one or two facilities to allow them to build capacity around their sport.

Badminton is a strong sport in Canberra with participation growth centred around university campuses. However, the sport reports constraints on growth due to competition for courts. There is potential for the sport to appeal to a wider market but new venues are difficult to locate. Like table tennis, badminton is sensitive to facility design and air circulation currents that impact play. This can make sharing in some circumstances difficult.

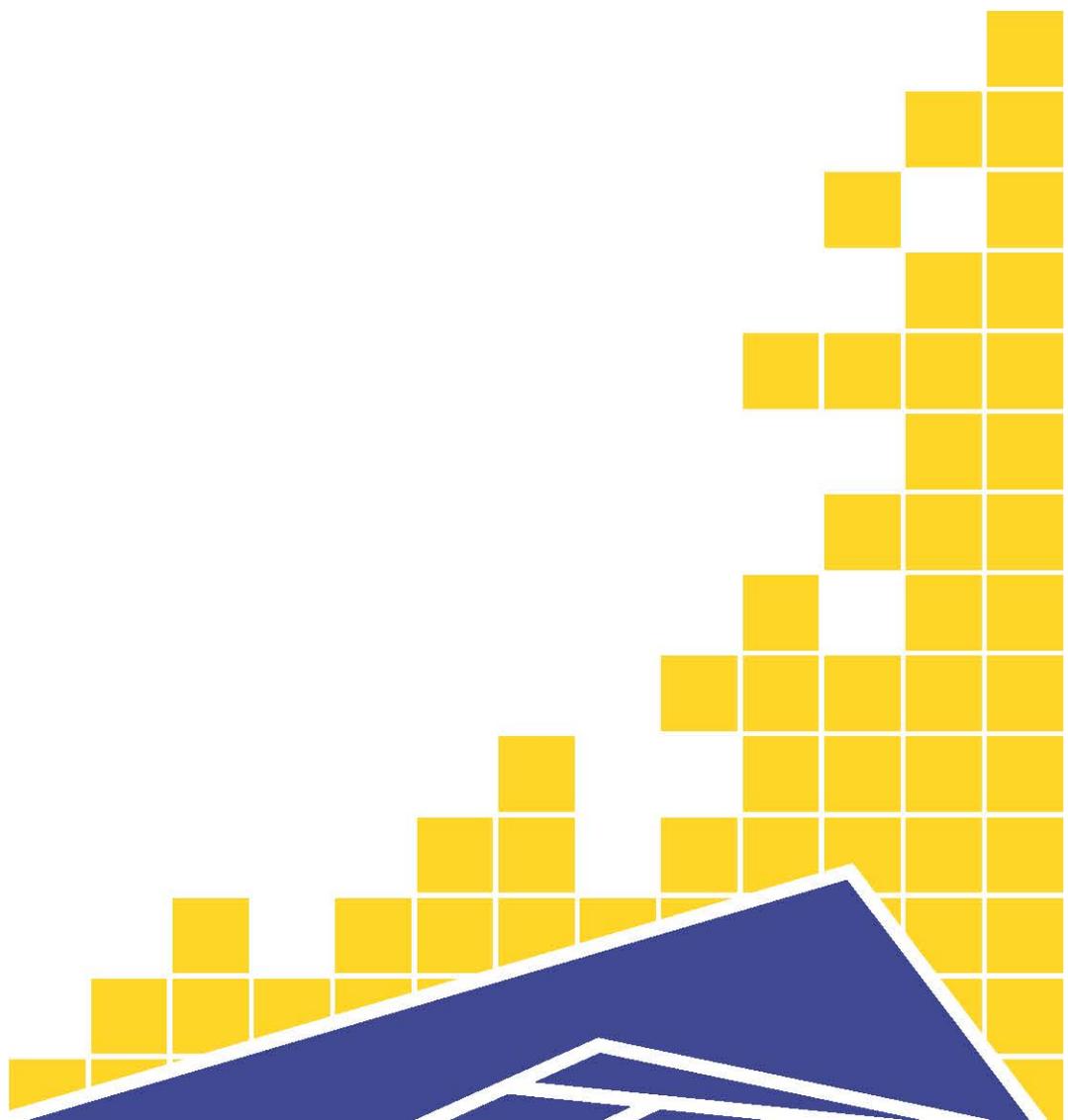
Combat sports such as fencing and martial arts are able to use wide range of spaces including community halls, school halls, program rooms and church halls. Participation numbers appear to be reasonably static with growth expected to align with population

growth. Discussion with one of the main martial arts has highlighted that availability of space is currently meeting needs but that there are issues with the low cost model of the sport and finding affordable spaces. In addition they have found that some arrangements have been too uncertain with late notice changes to availability affecting programs.

As the needs for space are more flexible and they can make do with lower roof heights compared to some court sports it is possible that the needs of some groups can be met by repurposing an existing space. ACT Property Group may be able to identify surplus buildings that could be leased to sporting groups.

4.8.2 Strategies

1. Sport and Recreation Services should investigate options to make the search for venues easier. A “live” list of those seeking space and their requirements could be circulated to venue managers, schools and ACT Property Group as a way of promoting potential users. Creating a central contact point for groups could be established using the web based systems already in place for field bookings.
2. The new policy and data base of school facilities released by Education and Training Directorate should be promoted widely to all clubs and groups.
3. Sport and Recreation Services could develop a number of standard lease or tenancy agreements that might make it easier for venue operators or property owners to accommodate sports.
4. Table Tennis may be a good fit for a regular user of a school facility, particularly an indoor space that is not compliant for courts sports. Alternatively there maybe surplus space within the Property Group’s assets that could be repurposed, or a centre that is looking for a permanent tenant.
5. Consideration could be given to a minor grants program that funds small modifications of existing facilities to allow a new sport to become a permanent user of a facility.





ACT GOVERNMENT- SPORT AND RECREATION SERVICES
BACKGROUND REPORT
ACT INDOOR SPORTS FACILITIES STUDY

Final

December 2015

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BACKGROUND REPORT

ACT INDOOR SPORTS FACILITIES STUDY

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1 INTRODUCTION

1.1 INTRODUCTION

The ACT Indoor Sports Facilities Study consists of two documents:

1. The Summary Report which summarises the background research and discusses the recommendations.
2. The Background Report (this report) which details the research and investigation undertaken for the study.

For an overview of the study purpose and methodology please refer to Section 2 of the Summary Report. The study was undertaken during 2015 and involved: analysis of the existing supply; engagement with sporting groups and with venue managers; research on trends in indoor facility design and management; and a detailed analysis of likely future demand. The following diagram summarises the methodology:



Figure 1: Study Method

2 BACKGROUND RESEARCH

2.1 STRATEGIC CONTEXT – EXISTING REPORTS

Document	Relevant Information
<p>Gymnastics ACT 2013 / 2014 Facility Plan Priorities</p>	<p>This document is an excerpt prepared by Gymnastics ACT from their full Facility Plan, which the organisation intends to implement by 2016.</p> <p>An activity highlighted for 2013/2014 is to increase the floor space available for recreational programs by 2000m². Actions and the progress on these actions achieved to date are detailed below.</p> <p>“Action: To respond to the data on population growth and service delivery, the highest priority for GACT in terms of gymnastic service and facility provision is exploring options to improve gymnastics supply in the Gungahlin area.</p> <p>Progress to date:</p> <p>GACT has spoken to Hockey ACT (HACT) and HACT has welcomed gymnastics clubs to hire their Indoor Hall at Lyneham. The floor is suitable for recreational programs only. HACT is considering the potential of including gymnastics floor fittings during the floor re-surfacing.</p> <p>Activities for 2013/14 - GACT needs to be a major stakeholder in the planning of new school facilities to allow for feeder programs to secure quality spaces with long term commitments in school settings. Whilst this is not the ideal business option, it is likely that continued membership growth will require club sites to be supported by school feeder programs.</p> <p>The construction of customised community facilities on school sites also needs to be explored. GACT needs to progress discussions with Government in both of these areas.</p> <p>With Mitchell becoming a dynamic industrial hub, GACT needs to explore the option of a warehouse conversion on behalf of the clubs.</p> <p>Action: To respond to the current needs of the clubs and state provisions in terms of gymnastic service and facility provision, the highest priority for GACT is to work with government to explore options for the siting and development of a customised State Gymnastics Centre which can also include club based facilities for overflow activities. The preferred siting option is a Weston Creek green field space, with the Majura Business Park and UC Sports Hub as alternatives.</p> <p>Progress to date:</p> <p>GACT continues to speak with Gymnastics Australia (GA) and the Australian Institute of Sport (AIS) about the possibility of hiring the Gymnastics Training Hall for all ACT competitions, team training and training camps in 2014. Whilst this is not the ideal option due to a lack of spectator seating it is a short term answer to one of our priorities. However, there are a number of positives, including excellent services and equipment, equipment that does not have to be set up or stored and ample of parking.</p> <p>Activities for 2013/14:</p> <p>Woden Valley Gymnastics Club's (WVGC) proposal for the construction of a mezzanine floor is a low priority at present. GACT needs to encourage discussions with WVGC to learn more about their proposal and how it aligns with our immediate priorities. Discussions also need to begin with WVGC to ascertain their urgency to investigate the security of their tenure with the Molonglo population expected to grow.</p> <p>Discussions will also commence with Canberra City Gymnastics Club (CCGC) to ascertain the urgency to sought assistance from government to examine the car park arrangements around CCGC to allow for safer drop off and pick up to the club at high traffic times and Southern Canberra Gymnastics Club (SCGC) around the recommendations of the Erindale Master Plan and their impact on the club.”</p>

Document	Relevant Information
<p>Capital Football Futsal Facilities Feasibility Business Case (Revision 1) 2014</p>	<p>Key findings:</p> <ul style="list-style-type: none"> ➤ A lack of dedicated Futsal facilities in the ACT is suppressing participation growth. ➤ Significant shortfalls were found in the characteristics of existing facilities used for Futsal in the ACT, including pitch sizes; quantity of co-located pitches; line marking; impact resistance of walls, fixtures and fittings; court dividers; avoidance of spaces, surfaces and openings where balls can be stuck; and spectator facilities for major events. ➤ Preliminary analysis suggests that additional indoor facilities dedicated to Futsal and capable of supporting other indoor sports will be financially viable. ➤ The preferred site for a new facility to service Futsal is McKellar Park. <p>Recommendations:</p> <p>Further investigations to be conducted to confirm the suitability of McKellar Park.</p> <ul style="list-style-type: none"> ➤ Facilities requirements and concept designs be further developed to enable the production of construction cost estimates based upon the single stage indoor and two stage indoor/outdoor options proposed; ➤ The delivery model to be confirmed to assist with progression of the financial analysis; and ➤ A proposal to the ACT Government to be prepared that details why the preferred site has been selected and requests financial assistance to construct a dedicated Futsal facility that is also capable of accommodating other compatible indoor sports. <p><i>Note: The feasibility of the following sites was investigated as a part of the study: Belconnen Soccer Club, Walkley Place McKellar (preferred site); UC Sports Commons, University of Canberra, Hayden Drive, Bruce; Old Holder High School site, Holder; Majura Park, Canberra International Airport; EPIC, Flemington Road, Mitchell; Hawker Football Centre / Hawker Enclosed Oval, Belconnen Way, Hawker; North Oval, Corner of Barry Drive and McCaughey Street, Turner; Mawson District Playing Fields, Corner of Athllon Dr and Beasley St, Mawson; and Molonglo Forest Park, Uriarra Road, Molonglo.</i></p>
<p>Molonglo Aquatic Sports and Recreation Centre Feasibility Study 2012</p>	<p>This study examined the feasibility of developing aquatic, sport and recreation facilities to service the future needs of residents of the Molonglo development catchment, neighbouring localities, and Canberra.</p> <p>Findings:</p> <ul style="list-style-type: none"> ➤ It is feasible to develop a district level facility located at the gateway to Stromlo Forest Park and near the Molonglo/Coombs community precinct and River. ➤ The facility could support a primary catchment of 81,000 people (Molonglo and Weston Creek) and a secondary catchment of Woden (32,000 people). ➤ A 'district aquatic facility' is considered most appropriate. ➤ Optimal facility mix: <ul style="list-style-type: none"> - Aquatic space (50m swimming pool, 25m program pool, play pool and learn to swim pool) - Gym (600sqm gym area plus yoga/aerobics and spin room) - Indoor courts (3 courts with long term expansion to 6 courts) - Medical facilities (health care, rehabilitation and child care by commercial tenants) - Community facilities (meeting rooms, members lounge and theatre) - Commercial and retail (restaurant/cafe and retail suites) - Administration (reception/ office)

Document	Relevant Information
	<p>The existing Belconnen Basketball Stadium (BBS) has been home to Basketball ACT (BACT) since 1991, but no longer meets the needs of this organisation. This study was commissioned to identify if there is demand for the facility to be used for community recreation or as a base for another sport.</p> <p>Key Findings:</p> <ul style="list-style-type: none"> ▶ The Belconnen catchment demonstrates a very low court to population ratio compared to industry averages. ▶ The facility is in need of upgrading. ▶ There is an opportunity for BBS to have four key focuses in the north of the ACT. Aspirations: <ul style="list-style-type: none"> - Home of sports - Event space (volleyball and badminton) - Satellite centre (volleyball, futsal, basketball, table tennis and fencing) - Storage - Leisure and entertainment space (e.g. Blood Transfusion Days, religious gatherings, small concerts, fairs and market days) - Social hub (volleyball, futsal, badminton, table tennis, fencing) - Participation pathway. ▶ Redevelopment foundations: <ul style="list-style-type: none"> - Make good the facility as a multi-use facility (\$1,107,539 excl GST) - Refurbish the centre to be more inviting and meet spectator and participation needs (Ranging from \$1,871,865 to \$2,996,469 excl GST) - Redevelopment of the site footprint to improve presence in the area, including car parking and the redevelopment of the pocket park in front of the facility (Ranging from \$3,223,127 to \$3,791,166 excl GST) <p>Direction for a renewed BBS:</p> <p><i>Vision: "To reposition BBS within the community recreation market, it is suggested that it refocuses itself by creating a strong community connection focus with the following and by changing its name to the Belconnen Active Recreation Centre (BARC)."</i></p> <p>Mission:</p> <ul style="list-style-type: none"> ▶ "To provide an Active Recreation and Sports base to the people of Belconnen and northern ACT which provides services, programs and events that can improve the physical, mental and social, health and wellbeing of the community. ▶ Connecting with our community so that they value the benefits of an active lifestyle. ▶ Providing them with sport and active recreational based opportunities and experiences so that they can chose to use Belconnen Active Recreation Centre. ▶ Offer accessible and quality recreational, sporting and community programs in the community to encourage community participation. ▶ To be the home of key sports that provide recreational activities, a competition base and development opportunities with a base for their administration, programs, competitions and key events."

Document	Relevant Information
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<p>Squash ACT Strategic Facilities Plan 2014</p>	<p>This report provides a “medium to long term plan for the creation or replacement of current facilities.”</p> <p>Current situation:</p> <ul style="list-style-type: none"> ➤ There are approximately 1340 players participating on a weekly basis in the ACT ➤ There are 9 major squash competitions in the ACT annually ➤ There are 47 squash courts in the ACT (7 of these are private) <p>Recommendations:</p> <ul style="list-style-type: none"> ➤ “That the Government provides an undertaking that no current courts in government owned facilities will be lost, unless other courts are built in the same vicinity. ➤ The ACT Government imposes conditions on any redevelopment of the Dickson facility (currently known as ‘Northside Fitness Centre’) so that any redevelopment requires a multi-purpose sporting facility to be built, on-site or nearby, complete with 6-8 squash courts. ➤ ACT Squash initiates discussions with the owners of the proposed ‘Next Generation’ multi-sports facility to be established in Lyneham to ensure that social and competitive squash can be played without the need for squash players to become members of the multi-sports facility. ACT Squash advises the ACT Government of the outcome of these discussions. ➤ The ACT Government notes that proposed Stage 2 enhancement of the University of Canberra multi-purpose indoor sporting facility could include 8-10 squash courts, which could partially offset any impending loss of Dickson Squash Centre. ➤ The ACT Government includes 6-8 squash courts in any multi-purpose sporting facility to be built within the Gungahlin area. ➤ The ACT Government proceeds with redevelopment of the Weston Creek facility only if 6-8 squash courts are included with any multi-purpose sporting facility to be built in the Molonglo area, understood to be in Coombes or Wright. ➤ The ACT Government will assist ACT Squash by loosening the existing controls required to develop the Woden Centre site.”
<p>Special Purpose Inspection Dilapidation - Building Report for Table Tennis ACT</p>	<p>This document is a condition report for the Table Tennis ACT facility located at Cnr Dawes St & Canberra Ave, Kingston.</p> <p>Key findings:</p> <ul style="list-style-type: none"> ➤ The building has reached the end of its serviceable life. ➤ Repairs are no longer economically viable ➤ Repair and maintenance of this building is NOT recommended. ➤ Replacement of this building is recommended.

2.2 DEMOGRAPHIC ANALYSIS

2.2.1 The Canberra Community

Age Profile (A social overview of the ACT 2009)

The median age of residents of the ACT is younger than that for Australia at (34.7 years compared to 36.9 years), making it the second lowest median age of all Australian states and Territories except the Northern Territory.

8.8% of the ACT population are within the 25-29 year age group, representing the largest age cohort, followed by 20-24 years (8.6%). The largest age cohort in Australia is the 30-35 year age group, again demonstrating the relatively youthful age profile of ACT residents.

Despite this current age profile, the ACT still demonstrates an ageing population with residents aged 65 and over representing an increasingly larger portion of the population compared to other age groups. The 65 and over age group is anticipated to increase in representation from 10% of the population in 2007 to 14.3% in 2019 (ACT Population Projections for Suburbs).

The districts anticipated to have the oldest population in the ACT include Weston Creek, Belconnen, Gungahlin and Tuggeranong, with Weston Creek to have the oldest population across the ACT with a median age of 41). Molonglo and North Canberra are anticipated to have the youngest populations across all ACT districts by 2019 (median ages of 29 and 32 respectively) (ACT Population Projections for Suburbs).

Household Type

The largest household type in the ACT is 'couples with children' (49% - 2% higher than the same figure for Australia) followed by 'couples without children' (33.9% - 2% lower than the same figure for Australia).

Income and Socio-economic Status

Incomes across the ACT are higher compared to other States and Territories and Australia as a whole (media individual and household incomes for the ACT are \$744 and \$1509 respectively, compared to \$466 and \$1,027 for Australia). However, there are still low socio-economic households.

Health

The life expectancy of ACT residents is higher than that for Australia due to lower health risk factors (including rates of physical inactivity). However, a health disparity exists across the population according to socio-economic status. Participation in sport and physical recreation is higher in the ACT compared to Australia, and continues to increase.

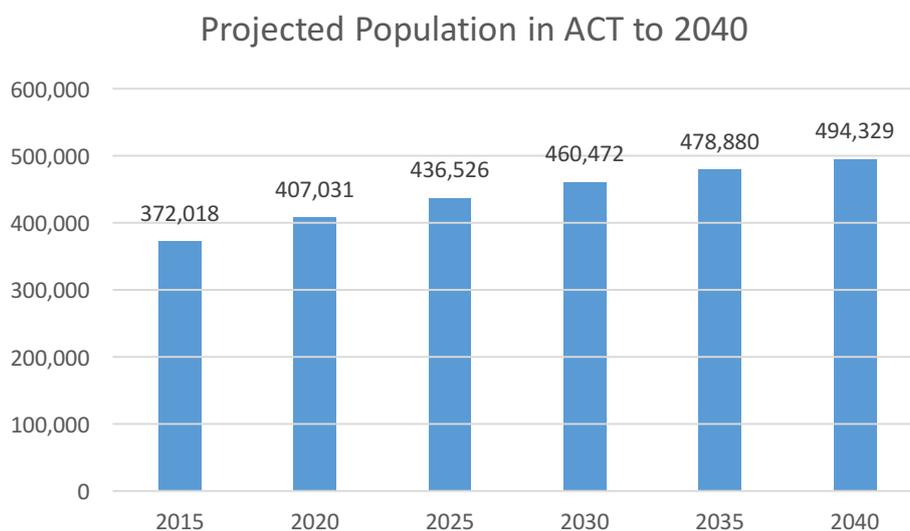
Aboriginal and Torres Strait Islander Population

Aboriginal and Torres Strait Islander (ATSI) residents make up 1.2% of the ACT population which is considerably lower than Australia as a whole. ATSI residents of the ACT have a younger median age compared to non-Indigenous residents (21.3 years compared to 34.7 years). In addition, ATSI residents are overrepresented in the lowest income brackets in the ACT, and have poorer health compared to non-Indigenous residents.

2.2.2 Population Growth

ACT is expecting to experience population growth in excess of 122,000 people over the next 25 years, equating to a 44% increase. The population in 2040 is expected to be 494,000 people, an increase from 372,000 people in 2015.

Figure 2: Projected population growth across ACT to 2040

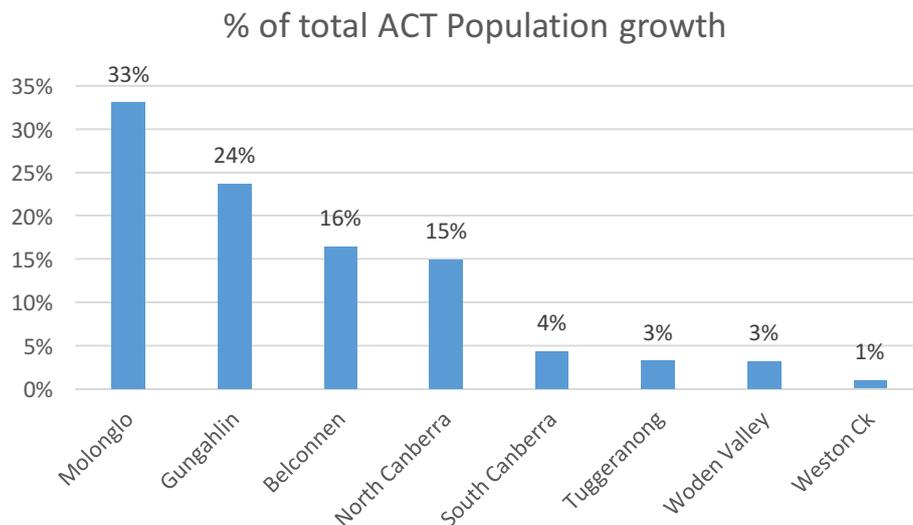


Across the seven districts in the ACT, Molonglo is expected to bear the largest portion of ACT's population growth, with more than 40,000 additional people expected to reside in the district by 2040 (33% of ACT's projected population growth). Gungahlin will also house a significant portion of population growth with an extra 29,000 people (24% of the ACT's projected growth), a 44% increase in the current population in this district.

Table 1: Projected population growth across ACT Districts to 2040

District	2015	2020	2025	2030	2035	2040	Difference (+no.)	Difference (+%)
Molonglo	2152	9513	16878	24738	33178	42603	40452	1880%
Gungahlin	65325	77288	87236	93416	94272	94272	28948	44%
Belconnen	90632	96484	101478	105740	109609	110732	20100	22%
North Canberra	49997	55396	59075	62148	65221	68294	18297	37%
South Canberra	23379	24776	26150	27389	28229	28725	5347	23%
Tuggeranong	85663	87233	88101	88618	89136	89653	3990	5%
Woden Valley	32524	33552	34397	35092	35787	36482	3957	12%
Weston Creek	22345	22789	23213	23331	23449	23567	1222	5%

Figure 3: Population growth by District as a percentage of the total projected population growth for ACT



2.2.3 Implications for Indoor Facility Planning

Key considerations arising from the demographic analysis are:

- ▶ The ACT has a younger average age than the rest of Australia (except for the NT) which suggests a likely higher participation in sport and recreation activities.
- ▶ The high proportion of families with children suggests that junior sport will continue to be a demand factor.
- ▶ The ACT has a much higher average income than that for Australia suggesting a greater capacity to pay for sport and recreation activities.
- ▶ The vast majority of population growth over the next 25 years will occur in Molonglo (+40,452), Gungahlin (+28,948), Belconnen (+20,100) and North Canberra (+18,297). It will be important to ensure that facility provision matches demands in these areas.



2.3 LEISURE FACILITY DESIGN AND MANAGEMENT

The design and development of leisure facilities has undertaken several major changes over the past two decades. The primary focus is now on expanding the facility mix to introduce multiple attractors to the community, including frequently a combination of 'wet' and 'dry' options.

The financial sustainability of leisure facilities is challenged by increasing service expectations in an environment where State and Federal government funding opportunities are scarce. The composition of facilities is concentrating on those elements that encourage 'year round' access, longer stays and higher returns.

There is a noticeable trend in Australian leisure facility design and operation towards the integration of a wider range of expanded leisure facility services, such as café, merchandising/retail, health and fitness centres, wellness, multi-purpose indoor sports courts, multi-

purpose program spaces and meeting rooms, and where aquatics are involved there is an increased emphasis on 'leisure water'.

In particular, kiosks are expanding into cafés and becoming features of aquatic and leisure facility design with modern décor and menu choices encouraging greater secondary spending and attracting external patronage. Further, self-service style menu options, supported by effective design, are becoming more popular to service the casual user of these facilities. This results in reduced operating costs from minimising the reliance on 'front-of-house' labour.

The combination of facilities into one integrated venue provides synergies in use and the potential for cross marketing between activities, whilst also providing a major focus as a leisure destination for the community. This can result in increased throughput and activity at the venue and improved financial performance.

2.3.1 Key Trends in Design of Multi-Purpose Indoor Sport Facilities

Trends associated with multi-purpose indoor court facilities are summarised below:

- ▶ Facility design elements have an increasing focus on those elements that encourage multiple usage opportunities, longer visitations and increased returns.
- ▶ There is an increased importance placed on secondary spending through food, beverage, merchandise and other retail. Food and beverage facilities are designed to have the capacity to support larger scale sporting and community/cultural events.
- ▶ There is an increased expectation of the community for high quality finishes and furnishings within leisure facilities. Higher quality finishes are incorporated to support broader community and cultural events, including amenities, wall finishes, lighting, audio/visual and seating.
- ▶ There is an increased willingness of the community to travel further to utilise a high quality leisure facility.
- ▶ Leisure facilities are becoming community destinations and meeting points for a range of physical activity and socialising needs.
- ▶ Given major increases in energy and water costs over the past ten years (and predictions of higher energy costs into the future), energy efficiency, waste energy re-use and recycling are increasingly important in facility design.
- ▶ Incorporation of indoor court facilities as part of a broader leisure facility mix can result in a range of economies of scale including reduced staffing costs, increased buying power and improved energy rates.
- ▶ Despite the influx of single court facilities as a result of the recent Federal Government's Building the Education Revolution program, the experience of many sporting groups is that there remains a shortage of available indoor court hours in many localities. Single court facilities are less efficient in running competitions (where multi-court facilities are preferred) and there is intense competition for access to indoor courts during peak times in many areas. In addition, none of the states or territories has made significant efforts to encourage community use of school courts.

2.3.2 Health and Fitness Facilities

As identified earlier, integrated indoor sport and fitness/wellness centres are increasingly the direction of provision. Key trends in health and fitness facilities are:

- ▶ The rapid growth in new health and fitness centres has resulted in strong market competition and increased accessibility.
- ▶ Group fitness programs can be far more commercially rewarding than traditional court uses and some centres have repurposed traditional courts in an effort to increase revenue and respond to the market.
- ▶ The rapidly increasing health and fitness centre market has raised expectations to ensure facilities incorporate high quality finishes with the latest in technology, lighting and audio visual elements.
- ▶ 24 hour access to facilities is increasing in popularity as work patterns change.
- ▶ Programs and facilities are designed to attract a variety of market segments, which are increasingly

age specific and aimed towards:

- Older adults;
 - Children;
 - Injury recovery;
 - Strength and conditioning;
 - General health, fitness and wellbeing.
- ▶ A large proportion of health and fitness floor space is retained as multi-use program rooms to accommodate a range of programs and to be adaptable to changing market interests.
 - ▶ Wellness centres are incorporated as part of the health and fitness mix to provide a comprehensive service to patrons, including allied health, beauty and relaxation services.
 - ▶ There is an increase in the use of personal trainers as patrons seek personalised fitness programs to achieve their goals.

2.3.3 Key Trends in Provision and Management of Leisure Facilities

There are number of trends evident in the management of existing leisure facilities:

- ▶ Many publically owned facilities are struggling to control increasing operating costs as facilities age.
- ▶ The non-contemporary nature of the layout and mix of older facilities is often not attractive to the wider community, requires higher operating costs and does not support other operational synergies.
- ▶ Many ageing facilities are experiencing low, and reducing, visitation.
- ▶ More commercially focussed models for successful in house management have emerged.
- ▶ There is limited choice in professional non-government indoor facility management service providers.
- ▶ Generally, indoor stadiums with less than three to four courts have a lower income generating capacity and lower likelihood of being financially viable. A minimum of three courts is generally required for economically sustainable indoor court facilities.

- ▶ Facilities that are designed and operated to be “multi-use” are generally operated at higher levels of usage capacity and financial performance than single sport/specialist facilities.
- ▶ Large regional facilities with four or more courts that are centrally located in large catchment areas, with a low level of external competition, in prominent positions have a greater chance of being financially viable.
- ▶ Larger centralised facilities are more efficient in terms of both competition coordination and financial sustainability.
- ▶ Successful indoor sporting associations have access to a larger multi court facility (4 or more courts) for competition and a range of smaller facilities (i.e. schools) for training.
- ▶ Increasingly, non-sporting uses of indoor facilities are pursued to maximise viability (e.g. events, displays, functions etc).

2.4 PARTICIPATION TRENDS AND IMPLICATIONS FOR INDOOR FACILITIES PLANNING

Appendix 1 provides a detailed analysis of participation trends as identified through ABS¹, ERASS², CSIRO³ and CASRO⁴ reports. The general implications of these trends for indoor facilities planning include:

- ▶ Local government (and the ACT Government) will have an increasingly important role in changing physical activity behaviour through provision of opportunities and facilities for active recreation.
- ▶ There is increased demand for “self-directed exercise related recreation” suggesting a need to respond to demand for public spaces and facilities to accommodate fitness and exercise activities with demand occurring before during and after work hours.
- ▶ People will want to be able to access recreation opportunities easily from where they live especially in areas where density is increasing. For Higher density areas, walkable access to indoor and built facilities will be important and for other urban areas local and regional linkages via cycle/walkways will grow in importance.
- ▶ Planning will need to take into account the needs of people of different abilities, ages and cultures. Facility design will need to be increasingly flexible and able to accommodate a range of activities as well as be able to change configurations as participation trends shift.
- ▶ Future facilities and activities will need to be safe, easily accessible, with few barriers to entry, and cater for formal and informal forms of participation. Provision of safe facilities and safe access-ways is of particular importance where participation by females is concerned.
- ▶ Provision of crèche facilities or programs with organised childcare will become more necessary to facilitate opportunities for participation by mothers.
- ▶ Facility design should maximise opportunities for generating increased revenue and utilisation and/or to reduce operating costs.
- ▶ In order to maximise usage and synergies with existing infrastructure, site location should focus on links with other facilities such as other sporting facilities, retail centres, or educational establishments. Site location should ensure that impacts on neighbouring residents are minimised.
- ▶ Increasing demands within limited budgets are likely to reinforce the need for regional scale planning of higher level facilities to ensure that facilities are economically and socially viable
- ▶ Maximum flexibility in design to accommodate varying community needs and forms of use should be a prerequisite for new centres.
- ▶ Sporting associations will need to recognise social and population changes and participation trends and adapt their activities and competition structures to suit (e.g. increased provision of social sport and “pay and play” opportunities).
- ▶ There will be an increasing need for less traditional/ “alternative” sport and recreation activities to address the trend towards unstructured recreation. Facility design will need to remain flexible so as to enable opportunities for informal/ non-organised and alternative activities.
- ▶ With children off their hands, older people will have more leisure time and higher disposable incomes and are likely to seek to participate more in active forms of leisure than in the past.
- ▶ Service providers will be obliged to ensure adequate levels of information dissemination and promotion of sport, recreation and physical activity opportunities.

1 Australian Bureau of Statistics. *Children's Participation in Cultural and Leisure Activities (2009 and 2012)*

2 *Participation in Exercise, Recreation and Sport Survey, Australian Sports Commission (2002 to 2011 reports)*

3 Hajkowicz, S.A., Cook, H., Wilhelmseder, L., Boughen, N. “*The Future of Australian Sport: Megatrends shaping the sports sector over the coming decades. A consultancy report for the Australian Sports Commission*”. CSIRO. Australia

4 ABS, National Centre for Culture & Recreation. *Participation in Sport and Physical Recreation. 2011-12 and 2013-14 reports*

2.4.1 Key Indoor Sport Participation Trends

Although there are issues with the sample data and the change in methodologies (from ERASS to NCCRS/ CASRO) there are some trends in indoor sport participation worth noting:

- ▶ The fastest growing area of participation is Gym/ Fitness with an increase from 18.4% to 26% of adults participating over the last 6 years.
- ▶ Basketball has shown growth from 0.9% to 2.7%
- ▶ Netball has had moderate growth from 2.7% to 3%
- ▶ For children there was strong growth in Gymnastics (0.9% to 4.8%) and Martial Arts (4% to 5.8%).



2.5 STAKEHOLDER CONSULTATION

A wide range of venue operators and sporting organisations were consulted. This section of the report provides a brief overview of key issues raised in these consultations.

2.5.1 Canberra PCYC

Canberra PCYC are in a service development phase and are investigating a number of provision and program issues that will enable them to improve their service offering to the community.

They operate a single centre at Erindale and are planning a new facility in Turner based around a refurbishment/reconfiguration of an old disused indoor centre.

Erindale PCYC

Erindale PCYC is smaller centre with a single sports court area and fitness gym, program rooms and amenities. The sports court is not used for court sports; rather it forms a program space for group fitness, martial arts and other programs. Previously they had hosted gymnastics which has now moved to a dedicated facility. The facility has an internal climbing wall which is not well utilised.

They are investigating minor improvements and program expansion for the centre, but not for court sport provision.

Turner PCYC

PCYC has acquired a disused facility in Turner that previously operated as an indoor sports centre. They are currently investigating options for the redevelopment of the facility and the range of programs and services to provide. Child care will be a core operation as there is a high need identified in area. In addition they will be running programs and activities appropriate to the community and according to need. If there is sufficient demand identified for court sport provision they may consider including it in the redevelopment and program scope of the centre.

Programs and Outreach

A number of outreach and diversionary programs are run across the city. Of note are:

- › Futsal Program in Melba- using the school hall
- › Basketball program in Harrison – using the school hall

Identified Needs and Provision Issues

- › Indoor sports facilities should provide occasional care for small children to enable greater participation of parents and carers in programs
- › There is a high need for child care and after school care programs

- › Gungahlin is an area of need and is undersupplied with facilities and programs

PCYC is always open to partnering proposals or discussions regarding facility management and program provision in areas of need.

2.5.2 YMCA

Two YMCA organisations operate in Canberra. YMCA NSW operates the Gungahlin Leisure Centre and the Canberra Olympic Pool. YMCA ACT has a major focus on child care and out of school hours care programs and accommodation. They operate the Health and Fitness Centre at Chifley and the Googong Fitness and Aquatic Centre .

The YMCA ACT runs a number of programs associated with childcare and operates 5 centres in Canberra. They also have a growing involvement in out of school hour care which predominantly operates in school centres.

YMCA does not have any centres with indoor courts.

Facilities

- › Googong Fitness and Aquatic (Private)
- › Chifley Health and Fitness
- › 5 childcare centres
- › Operate OSH Care in 16 schools

Currently no plans to develop new facilities, and no strategies associated with provision of indoor sports. However if the right opportunity came up they might consider a new facility if financial viability could be demonstrated

Future Plans and Community Needs

YMCA ACT have specialised mostly in child care related services and fitness/ wellness programs. They are able to access the expertise of other states in building operational capacity in terms of centre management if required. They can see some strategic benefit in considering indoor sports centres but have no current strategy to move that way.

2.5.3 Canberra Institute of Technology (CIT)

Canberra Institute of Technology is the Territory run vocational training institution (TAFE). It operates a number of campuses, three of which have indoor sports halls. However the operational direction of CIT appears to be moving away from providing these halls as public access facilities and focusing more on the facility's support for CIT activities.

In general outside groups are able to hire a facility subject to CIT needs. Hire rates are \$100/ hour plus the organisation must have a minimum 10 M public liability insurance.

Facilities

CIT has three indoor sports halls, namely:

- CIT Bruce- indoor hall has been re-developed with carpet floor covering and other modifications which have reduced functionality for sport. It has been used by Futsal in the past.
- CIT Woden is used by Roller Derby and others but is due for closure. The Woden campus will be decommissioned. Existing courses from Woden will be relocated to Bruce and Reid.
- CIT Reid Indoor sports hall is likely to remain in operation and is pretty much booked out with current tenants.

There is demand for access to the existing courts and the CIT facilities management team gets enquiries regularly (Futsal, Soccer, Badminton were mentioned along with a number of field sport teams looking for training space when outdoor fields are unusable).

Future Plans and Facility Needs

Currently CIT is planning to close the Woden campus and relocate its courses between Reid and Bruce. The latter two campuses will be upgraded and expanded to accommodate this. Strategically there has been no identification of indoor sport court needs and redevelopment of the Bruce centre and the closure of Woden have meant that effectively 2 indoor courts will be removed from the supply.

While there are plans around the possible development of a new campus in Tuggeranong it appears unlikely this will include an indoor facility.

However CIT does run a number of fitness and sport related courses and does have a need for indoor courts both to support the curricula and to provide for student activities.

2.5.4 Australian National University (ANU)

The ANU sports centre is managed by the ANU Sport and Recreation Association and has indoor sports courts, squash courts and a gym/ fitness centre. The Sports centre also has outdoor facilities including synthetic fields. The indoor facilities have not been designed

as event venues and do not readily accommodate spectators. Events at the centre are restricted to University Sports but external users are allowed.

Facilities

- 4 indoor courts
- 1200m2 gym/fitness
- 2 squash courts

Peak times are 5pm to 10 pm weekdays and 8 am – 7pm weekends. There is no spare capacity during normal semester. During holidays there is some capacity. Hire rates vary with discounts for members and negotiated agreements for regular users. However, the focus of the centre is to meet needs for the campus.

Future Plans and Facility Needs

There are no plans for expansion.

2.5.5 University of Canberra

The University of Canberra campus at Belconnen has an indoor sports centre with squash and sports courts. In addition there are fitness rooms, cycle studio and aerobics. The centre is not really designed for spectators and like many other centres has not been designed with the hosting of larger competitive events in mind. The facility is managed by the university and allows external use. Hire rates are around \$60/ hr for the indoor courts and \$20/ hr for squash courts. Students get discounted rates.

The main users are Badminton, futsal and Squash

Facilities

- 4 squash courts
- 2 sports courts
- Fitness room
- Cycle Studio
- Aerobics room
- Adjacent fields

Peak times are 5pm-10pm weekdays. The University has very little space capacity for indoor sports courts. Squash ACT moved fixtures to the centre and have courts booked Tuesday – Thursday nights.

The indoor sports courts are an older design and do not really have sufficient run-off space for contemporary standards.

Future Plans and Facility Needs

The University had plans for a \$10 M expansion including 4 new courts. However federal funding had not been finalised before the last federal election and the incoming government did not honour the commitment.

The university is still keen to pursue expansion of the facility and continues to work on a strategy.

2.5.6 mpowerdome

mpowerdome is a privately run commercial facility that provides a wide range of programs, social sport and space hire. The centre is based on a large indoor centre with a tensile membrane roof covering 8 tennis courts. They currently accommodate both internal and external programs, events, party hire, school programs, holiday programs and fitness and wellness. Sports catered for include: tennis, soccer, netball, volleyball, handball, floorball, modified sports etc.

Facilities

- › 8 x indoor tennis courts (roof height at 12.5 m)
- › 3 x outdoor courts
- › Ancillary spaces

While the centre does run its own programs court hire for external groups is around \$30/hr.

The centre is suitable for major events due to the size of the area under cover and their ability to reconfigure spaces. However a major issue for the centre is difficulty of resolving parking issues. Vacant unused space is available adjacent to the centre which can meet parking needs, however the centre is required to obtain a permit every time they want to use the space. A more sustainable solution which allows ongoing use is sought and would appear to make sense given the scale of the facility and the fact it is a good location to support events.

The centre's peak use times are Monday-Friday 4.30 pm to 10 pm; Saturday 8 am to 6pm and Sunday 12 pm to 6 pm. They are at or near capacity at peak times and accommodate around 2500 users per week.

Future Plans and Facility Needs

mpowerdome have plans to expand into the outdoor courts to provide inflatable, physical activity programs and other social modified sports. There are also proposals for increased arts/entertainment and training activities. They believe there is strong potential in this market; however a critical issue will be the resolution of the current parking problems.

2.5.7 Canberra Tennis Centre

The Canberra Tennis Centre is a partnership between Tennis ACT, the ACT government and Next Gen Fitness. The newly developed centre will provide 4 indoor tennis courts and 18 outdoor courts integrated with the Next Gen centre offering squash, swim and gym. The operation of Next Gen will be on a membership basis and external hire to groups is not envisaged - however there may be opportunities for some event hire of the squash courts as well as some social play. Tennis ACT will provide the tennis services and tennis related programs and will operate a wide range of participation and elite programs and events.

The indoor tennis courts will be focused on tennis and associated programs.

Facilities

- › 4 indoor tennis courts (plexicushion)
- › 8 x plexicushion outdoor
- › 12 claycourts- outdoor
- › 4 synthetic grass- outdoor
- › 4 mini-courts - outdoor
- › 6 glass backed squash courts
- › Indoor swim
- › Indoor fitness
- › 8 outdoor courts

As the centre was only commencing at the time of interview no usage data was available.

2.5.8 Australian Institute of Sport (AIS)

The AIS has been established with a primary purpose of developing elite athletes. The priorities in venue management are subject to this agenda and this can often mean that external users will need to be flexibly when training and elite needs require changes in the program.

Apart from The Arena which was developed with spectators and major events in mind, the other spaces are primarily design for training and areas such as that for gymnastics do not readily accommodate a competitive event and the spectators associated with them.

The Arena is the main event venue and show court and has the capacity to be configured for most indoor sports. However, as a premium venue, hire costs necessarily include days either side of use for set up and pull down.

Facilities

- › 5x court indoor sports hall including a show court
- › 2x court multi-sport hall (approx. 1 court converted to strength and conditioning centre)
- › AIS Arena
- › Combat sports area – also used for futsal training
- › Gymnastics Centre

Hire rates can vary and regular user agreements are negotiated- users do have to be prepared to be flexible when AIS program needs require a change to schedules. In general rates are around \$65/ hr per court.

Future Plans and Facility Needs

Apart from upgrades planned for the arena, no major changes have been identified. But AIS management continues to look at better models for managing facilities

2.5.9 EPIC – Exhibition Park in Canberra

EPIC is a major events precinct with multiple centres and facilities able to accommodate a broad range of indoor and outdoor events.

Of particular interest is the Coorong building which is the old 3 court indoor centre that once supported basketball. As a large indoor space it is used infrequently throughout the year for short events.

Capital Football have commenced negotiations for the centre to be used once again for court sports-particularly as a futsal centre. This interim arrangement would give them regular access to the facility, however, futsal would need to vacate periodically when event needs dictate.

There are a number of other large indoor spaces at EPIC and occasionally these spaces may be hired by sports groups in wet weather as alternative locations for outdoor training.

EPIC have no plans for additional facilities.

2.5.10 ACT Property Group

ACT Property Group manage a number of properties including community purpose facilities and “surplus” buildings that are pending reuse or are not currently required. Buildings are leased to user groups/ tenants and there is always potential to identify innovative interim or possibly permanent uses for “surplus” buildings that can help meet demand for indoor space.

Property group indicated that there may be an opportunity to find a building for Table Tennis or other users that don't require full sport court spaces.

Property Group endeavour to assist community groups but do need to run on a business basis and rents charged will reflect the costs of occupancy and the value of the building.

2.5.11 Badminton ACT

Badminton has more than 500 senior members and a growing number of junior players mostly based around school competitions.

The sport has a number of clubs that in general use school indoor courts to conduct their activities with between 1 and 3 sessions a week at each location. Not all badminton is organised by clubs associated with Badminton ACT. A recent change was the ANU club joining the association and this is responsible for the recent increase in numbers.

Facilities Used

The following facilities are used for the sport (note: the court numbers reflect badminton courts- it is possible to fit 3 on a full sized basketball court but for smaller

sports courts only 2):

- Gungahlin College (6 courts)
- Lake Ginnindera College (4 courts)
- University of Canberra (8 courts)
- ANU (8 courts)
- Canberra Boys Grammar
- Woden Basketball Stadium (6 courts) (note: this is due to cease operation this year which will leave Badminton short of an important venue)
- Erindale Active Living Centre (6 courts)
- Tuggeranong Indoor Archery Centre (4 courts)
- Kaleen High school (6 courts)
- Wesley United Welfare Centre
- Belconnen community centre
- Canberra Institute of Technology Reid (likely to be the only remaining CIT indoor centre after Woden closes)

Participation and Growth

The main driver for participation growth is the tertiary education institutions and increasing numbers of overseas students. Three centres are used heavily for Badminton: University of Canberra; ANU and Erindale (all with 3 or more sessions per week).

The sport hosts a number of events each year (usually at ANU) including open and invitation championships as well as school championships. A junior championship is also held yearly at Kaleen.

There is probably latent demand for more court hours but the sport finds it hard to get volunteers to run competitions and it is difficult to get any additional court times. A key market for growth would be high schools as Badminton appeals to those students who are less inclined towards more physical sports and the sport works well at social and participation levels.

Future demand is also likely to come from growth areas and the sport believes there is unmet demand in Gungahlin and generally a need for more facilities there.

Facility Issues and Future Plans

Generally the sport is happy with current facilities and recognises that with their high reliance on school facilities they need to be flexible at times. Average fees for school court hire are about \$90/ 2 hours.

Issues with current facilities include:

- Multi-use marked courts and line marking confusion
- Lighting- many centres have inadequate light intensity for Badminton. Upgrading lux levels could improve usability of some centres.
- Inadequate run-off
- Limited court hours
- Competition from other sports for hours they have now.

An ideal facility would have 8 courts (which would require 3-4 full sized sports courts). Height is also an issue with the preferred height of centres above 9.2 m. and preferably 12 m. At least 1 show court with spectator capacity is also sought. Floors should be timber (not synthetic) and lighting would be sufficient (web search indicates 500 lux for standard competition and training and 1000 lux for high level competition).

2.5.12 Volleyball ACT

Volleyball ACT is resident at the ACT Hockey Centre at Lyneham. This has been a successful partnership with an allocation of court hours agreed each year between March and October. Generally volleyball operates Monday to Thursday from 5 pm to 10pm and is able to set up 4 courts. The centre also allows a show court with 1,500 spectators.

The courts have recently been resurfaced and the centre is very good for Volleyball's needs with one major issue being no provision of drinking water chillers. Discussions are underway with ACT Health to allow water chillers at the facility.

Court charges are \$51/ court/hour or \$170 for the 4 courts/hour.

Facilities

The ACT Hockey Centre (Lyneham) is the main competition venue however other venues are also used:

- ▶ Southern Cross Stadium at Tuggeranong is utilised on Wednesday nights from 6 pm to 10 pm for competition and Sunday nights for training (1.5 hrs).
- ▶ mpowerdome hosts a competition which is not affiliated with the Association and runs as a social competition.
- ▶ School facilities are also used for training (namely Marist, St Clare's and Campbell). Charges range from \$30/hour.

Once per year Volleyball also use the Netball centre for a tournament.

Access to the AIS is limited and it is difficult to make any block bookings. AIS are primarily used for elite teams.

Participation and growth

Participation in social competitions has doubled over the last 2 years.

Formal club competition is currently running at 5% growth. There are 6 clubs with 1,800 players in the formal competition. Including social competitions there are 3,500 players.

Volleyball is looking toward beach volleyball for growth in social players and is considering building 6 beach courts near the Lyneham centre. Currently they have a beach competition at Civic Pool.

The major issue for clubs is access to courts for training.

Facility Issues and Future Plans

As an approximate guide the demand from volleyball clubs for training space is for 2 courts for 4-6 hours each week per club. With six existing clubs this equates to 48 - 72 court hours per week.

The only future plans are further improvements to the Lyneham indoor courts and the development of the Beach courts at Lyneham. Volleyball ACT is unaware of any other plans for new courts.

2.5.13 Netball

Netball is a very strong sport in ACT with more than 6000 players (including about 1800 social) and 2000 juniors involved in Net Set Go. There are five districts and the growth of the sport is through continued development and support at district levels. The current strategy has been to invest in district level facilities. However, Netball ACT runs a headquarters centre at Lyneham which includes indoor courts.

Facilities

The headquarters facility is a four court indoor centre with meeting rooms, kiosk and the normal amenities supporting competition as well as the offices for Netball ACT. The Lyneham facility is used 44 weeks a year and most nights from 6 pm – 10 pm. Use is mostly for social competition (4 nights/ week). In summer (Nov-Feb) Futsal uses the venue on Fridays and Sundays. No futsal is played at the centre from April and the centre is utilised almost completely by netball.

A second social competition has been established at Southern Cross Stadium and runs Tuesday & Thursday from 6 pm – 10 pm utilising 2 courts. There are several social competitions at other indoor venues that are not affiliated with Netball ACT.

All major games are played at the AIS and each year a block booking for these games is negotiated with AIS at between \$5,000 for a day or \$8,000 for 3 days (i.e. for carnivals).

Participation and Growth

Growth is currently running at around 1.2% mostly driven by population growth rather than any direct strategy.

Netball Australia is developing a new format called "Fast Five" which will both grow participation level and lead into competition grades and even international teams. This is likely to grow the sports profile and participation levels across the country. This is partly because of the success Netball ACT has had in developing the social competition. Fast Five could be used for school competition development, corporate competitions and could help with daytime market development.

Growth in club sport is driven by the districts so there has been a focused effort on getting district competition facilities upgraded. ACT Netball has received \$2M funding from ACT government for facility upgrades and recently upgraded the outdoor district level facility at Charnwood and is upgrading other facilities.

Facility Issues and Future Plans

While there is growing demand there is also a need for the sport to be more efficient in using existing facilities. Currently district court facilities could be used more effectively and the sport may have to consider changing long established practice such as not playing on Sundays.

Netball has been focusing on improvements to outdoor district facilities and currently has no plans to expand the number of indoor courts at Lyneham. However they do have space adjacent to the current facility should demand increase to the point where they would consider expansion and a funding strategy had been developed.

Attitudes at district level are shifting with indications there are increasing desires for more access to indoor centres.

2.5.14 Basketball

Basketball's main centre is their facility at Belconnen. They have around 192 teams involved in competition of which 375 participants are juniors out of 6,500 + participants overall. There are 17 clubs. Their major issue is constraints caused by lack of access to courts for training and to some extent social competition development.

Facilities

- Belconnen – 4 courts: 6 pm – 11 pm Monday – Thursday; Fri/Sat/Sun juniors 9 am – 6.30 pm. The Belconnen centre is used all year round and has no excess capacity. Court charges for teams wanting to train are \$35/ hr for members and \$48 for non-members.
- Woden Basketball Stadium– training use.
- Tuggeranong Southern Cross stadium- 2-3 courts Mon/Wed/Thurs. Fri-Sun 3 courts full time.
- A number of school facilities are used by clubs for training with some hire fees reported as \$ 50-60 hour plus a call out fee of \$200.
- AIS is used Thursday evenings for training (if court hours are available).

Participation and Growth

There are about 2270 participants in senior teams for a 21 week season each player pays \$15/ game – which is high due to court costs. Currently growth is around 5% p.a.

Basketball ACT estimates that in the next 10 years they will need an additional 2-3 courts in Belconnen; at least 3-4 new courts in Gungahlin. This is on the assumption that there will be new courts at Molonglo facility.

Facility Issues and Future Plans

Basketball is looking at investing further in the Belconnen facility and developing an additional 2 outdoor courts to the north of the stadium. These would support expansion of social/ recreation programs (such as 3 on 3) and provide additional training capacity. In the longer term they are looking at developing additional indoor courts as well.

There is demand for more basketball court hours/ participation but currently no access to facilities.

The major issue is access to training space and the only current solution is use of school facilities but Basketball feels that many schools set up pricing and access structures that discourage use (e.g. make it un-economic to use them).

The closure of the Woden Basketball Stadium courts will take a further 3 courts out of action and will create more demand.

Existing demand for court hours for competition and training cannot be serviced unless there is some partnership with schools. Strong growth in juniors is possible if more courts are available.

2.5.15 Hockey

Hockey is based at the ACT Hockey Centre at the Lyneham complex where their venue has 2 outdoor synthetic courts and an indoor court which also provides for other sports (mainly volleyball). Indoor hockey is conducted from October to March.

Facilities

- The indoor court at ACT Hockey Centre operates Monday to Sunday, from 5 pm – 11 pm weeknights and Saturday – Sunday. It is available for team training, representative training and some competitions.
- A junior competition is played at Melrose College 2-3 nights week.
- Woden Basketball Stadium conducts a juniors competition 1 night/ week.

Participation and Growth

There are approximately 1000 participants in the summer indoor competition. Numbers have been stable but there is limited capacity to grow without an additional indoor venue.

Hockey Australia is looking at introducing a new participation form of the game to grow social participation.

Facility Issues and Future Plans

The major issues for Hockey are:

- › The need to invest in the Lyneham centre with proposed improvements and refurbishments to the value of \$2.3 million. To fund these improvements a better revenue stream is required.
- › Outdoor synthetic surfaces need replacement/refurbishment about every 7-8 years which currently costs about \$350,000 a field.
- › With high facility costs and lower player numbers it is difficult to stay competitive in the social sport market.

At the moment there is no demand for additional outdoor facilities and proposed introduction of the modified version of the game to drive participation may increase indoor demand. Normal format indoor would not be viable as a basis for operating a new indoor facility. Hockey would like additional access to indoor courts in growth areas and Tuggeranong, but are not in any position to own or operate a facility.

Key considerations for upgrading the Lyneham centre include:

- › No heating or cooling in the indoor centre.
- › Need better use in summer- more tenants.
- › Poor daytime usage.
- › Need for drinking water coolers.
- › Need for better hospitality spaces and a centre café.
- › Water costs for the outdoor fields (\$120k /yr) – The Centre pays residential water rates and feels they should be paying club/ community facility rates. The Association is currently commissioning a water capture/re-use system which received \$300,000 funding from the ACT Government.
- › Need to upgrade lighting .
- › Lighting bill for indoor and outdoor fields is 100k. However, they have solar array on the roof which covers their power costs in Summer (about \$2000/ mth).

The management of the Indoor centre could improve with some facility upgrades and better use programming.

Hockey ACT is considering changing the facility mix at Lyneham and including a childcare business and possibly a niche commercial Gym. The Association would need to alter their lease to undertake this.

2.5.16 Futsal

Futsal is run by Capital Football and is well integrated into an overall football sports program. The organisation has had strong growth in both indoor (futsal) and field (outdoor competition) modes. Capital Football have identified that there is significant potential to continue growing participation in futsal however a lack of facilities is the major constraint. While registrations in football have increased on average by around 5%

p.a. this has not been transferred to futsal as they are unable to accommodate growth, even though demand is reported.

Facilities

Currently futsal is played in a number of facilities:

- › AIS
- › ANU
- › University of Canberra
- › Woden Basketball Stadium (run by Southern Cross Club) and due to close at the end of current lease)
- › Gold Creek School
- › Mt Stromlo High School
- › Lyneham Netball Centre
- › mpowerdome
- › Southern Cross Stadium, Tuggeranong
- › Canberra Grammar

Participation and Growth

Currently futsal runs across multiple competitions at social and representative level with teams across junior, senior, male, female and schools based competitions. The business case analysis undertaken for a new futsal centre identified that there were four main organisers of competitions:

- › North Canberra Futsal
- › South Canberra Futsal
- › Capital Football (including F League and Premier League)
- › Boomerangs

Total players for 2014/15 were 4,157 (1095 female and 3062 male). However, Capital Football has indicated there is strong demand and growth potential in female participation.

Facility Issues and Future Plans

Futsal has undertaken a detailed study on options to meet court needs. The sport has significant latent demand and cannot obtain court hours in sufficient quantity or at multi-court centres to accommodate this demand.

In recent time Capital Football has lost access to some centres (CISAC had 3 courts which have been converted to indoor fitness and available court hours at the netball centre have been reduced) while at the same time there is increasing competition for court hours. With closure of the 3 courts at Phillip undersupply will worsen.

The feasibility and business case undertaken by Capital Football has indicated that a dedicated futsal facility in a central location would be the best solution and would be a viable option in regard to operational costs. The major issue is access to capital funding to develop a centre.

The Feasibility Report is reviewed in more detail in Section 2.1. In brief it found:

- ▶ A lack of dedicated futsal facilities in the ACT is suppressing participation growth.
- ▶ Significant shortfalls were found in the characteristics of existing facilities used for Futsal in the ACT, including: pitch sizes; quantity of co-located pitches; line marking; impact resistance of walls, fixtures and fittings; court dividers; avoidance of spaces, surfaces and openings where balls can be stuck; and spectator facilities for major events.
- ▶ Preliminary analysis suggests that additional indoor facilities dedicated to futsal and capable of supporting other indoor sports will be financially viable.
- ▶ The preferred site for a new indoor facility to service futsal is McKellar Park.
- ▶ The recommended facility is a 4 court facility with either a single stage development or a staged development with the initial stage 2x indoor and 2x outdoor.

Capital Football is negotiating with EPIC for access to the Coorong building, a 3 court parquet floor centre that had previously been the home of basketball in Canberra. Although it is an older facility the courts are in good condition and can be remarked for futsal and the facility is well located. Access would be on a “regular tenant basis” not a sole tenant so there would be times that other events and uses will displace futsal. As a short to medium term solution to the shortage of court hours this is a good solution. As the facility will have Futsal as the main user, it could be expected that this will result in a net increase in court hours as futsal only made limited use of the Phillip facility (which is closing soon).

2.5.17 Gymnastics

Gymnastics has about 4000 members and in addition has affiliated sports such as cheerleading (3 clubs with approximately 300 members). The sport has been developing well in Canberra but does have concerns about facility access. One of the issues the sport faces is the unusual delivery model where some clubs are essentially run privately by facility managers. In part this could be a consequence of limited access to appropriate facilities and limited funding for development of Gymnastics facilities.

Another major issue for the sport is lack of coaches. All coaches are paid but recruiting and training new coaches is problematic.

Facilities

Currently Gymnastics has the following clubs:

- ▶ Tuggeranong Club - (over 1200 members)
- ▶ Woden - building leased from ACT Property Group
- ▶ Belconnen Club - in private centre
- ▶ Canberra City
- ▶ Gungahlin - in private centre
- ▶ Trampolining in the Tuggeranong Archery centre

All operate in permanent facilities except Trampolining which needs to set up and pull down.

Participation and Growth

Growth is constrained by lack of venues (for permanent set up) and lack of coaches. There is demand for additional places.

Gymnastics has about 30 events a year across all the disciplines and believe a dedicated venue is warranted. This venue could also support other sports such as martial arts.

School based gymnastics is growing and there is an emerging demand from affiliated disciplines such as cheerleading, acrobatics and aerobics.

Facility Issues and Future Plans

The main facility issues identified by Gymnastics include:

- ▶ Lack of event venue. The Arena is satisfactory but at \$2,000 a day is expensive to hire and requires extra days for setup and pull down. The sport is seeking a venue that is centrally located and can accommodate up to 1,000 spectators. The gymnastics arena at AIS is suitable for training but is not designed for events.
- ▶ A dedicated headquarters venue that provides an events venue and allows for the full range of disciplines (i.e. artistic, tramp, rhythmic etc.) is sought.
- ▶ Cost of using some facilities (e.g. Woden Gymnastics pay \$70,000 a year to rent their facility which includes some outgoings and facility maintenance).

2.5.18 Table Tennis

ACT Table Tennis is currently based in an old building in Kingston which accommodates 5 tables. The club has around 300 members of which 120 play competitively and the remainder play socially.

They have a strong seniors program running from 9.00 am to 1.00 pm most weekdays. The centre is well used 5 nights a week with a combination of training, coaching and competition. Competition runs for 32 weeks a year and the centre is open an additional 10 weeks for social play. Generally a typical evening is runs from 4 pm - 6.30 pm for coaching and practice and 7 pm - 11 pm for competition games.

They also have a schools program with 4-5 schools using the centre for coaching and social competition.

The organisation recognises there is a major issue with the sustainability of the current venue and are looking to develop a strategic plan for the establishment of a new facility.

Facilities

Currently ACT Table Tennis uses the Kingston centre for regular games and the Tuggeranong Archery centre. They have also used mpowerdome for major events.

The current facility at Kingston is not really suitable for their needs, it is 60 years old and has major structural issues.

Participation and Growth

Participation is relatively static, but there is an opportunity for growth. However, with the current facility at Kingston the organisation has limited capacity to service any growth. Access to additional space would be needed to grow the sport.

Events include the ACT Table Tennis Open which attracts 150 competitors and a Vet's Championships which attracts over 400 participants. They have also looked at the opportunity to run a senior national championship.

The organisation would like to expand school's competitions as this could also integrate with a talent identification program. They currently have an Australian under 15 champion.

Facility Issues and Future Plans

A recent building assessment (2014) of the facility in Kingston found that:

- ▶ The building has reached the end of its serviceable life
- ▶ Repairs are no longer economically viable with a number of structural issues including asbestos, differential settlement of foundations and the numerous works required to make the building suitable.
- ▶ Refurbishment of the building is not seen as practical compared with the cost of replacement.

The club recognises that a purpose built facility would be the best solution but they would be financially unable to fund the development. The association would also struggle to fund the needed refurbishments of the existing hall at Kingston, notwithstanding that the formal advice is not to invest further in the facility.

The organisation believes they would be able to fund the operational cost of a new facility but not the capital cost of construction. Refitting of an existing building is a possibility- however the club appreciates the central location of the Kingston facility.

Their ideal facility would incorporate:

- ▶ Roof height 5 m plus
- ▶ 8-10 tables
- ▶ Spectator capacity
- ▶ Kiosk
- ▶ Storage
- ▶ Office
- ▶ Meeting space
- ▶ Toilets and showers

Such a facility could accommodate events. Alternatively, access to a smaller facility for normal training and games could be complemented with occasional access to a larger low cost venue for events.

2.5.19 Squash

Squash developed a facilities strategy in 2014 to guide future investment and planning around facilities. The sport is being planned around 6 districts/ catchments with a single larger facility for events (Phillip).

The sport remains strong with a number of clubs and demand for social play is strong but difficult to service with the available courts. Currently there has been 17 % growth in social play in the last 3 years with social demand now accounting for 70% of participants. They believe there is potential for growth which is constrained by lack of additional court hours.

There are about 350 - 400 players per competition (17 weeks) and these are held twice/ year. There are two masters competitions (2 x 12 weeks). ACT Squash holds major events as well and national championships are held there every few years. The ability to host events of this scale could be threatened by loss of available courts or closures.

Facilities

Squash recognises that stand-alone centres are no longer viable and that provision for squash as part of a multiuse facility is preferable. The sport has explored facility designs with moveable walls that allow reconfiguration for other sports. The key facility concerns are:

- ▶ Potential loss or reduction of courts due to the Weston Creek Community Centre redevelopment. Squash has suggested adding courts to the proposed Stromlo Leisure Centre could offset this loss.
- ▶ Risk of further court loss or restrictions at Dickson Tradies Club which is at capacity (Team Fitness).
- ▶ Lack of planning for additional courts in major growth areas such as Gungahlin.
- ▶ The 6 squash courts at the new Tennis Centre (Next Gen Fitness) will be restricted to club members, predominantly for social play. Squash understands that Next Gen may consider making the courts available for some special competition events.

Participation and Growth

There is growing demand arising from loss of facilities, population growth, and resurgence in popularity of squash as social sport/fitness. However, the lack of accessible court hours is a major issue. The key concern is to ensure squash is integrated with other facilities in the growth areas so that viable facility models are established.

Facility Issues and Future Plans

Squash would like to see a provision model set up around:

- ▶ Main centre and competition venue at Phillip.
- ▶ 6 court facilities in the districts- with a focus on establishing facilities in Molonglo (if losing Weston Creek), Gungahlin and Canberra University (if losing Dickson).
- ▶ All squash courts to form part of multi-facility centres which increases viability.

2.5.20 Ice Sports

Although the main focus of this report was indoor court sports and Gymnastics, Ice sports are included due to the unique nature of their facility needs. The main Ice sports are Ice Skating and Ice Hockey. A number of smaller social sports are run out of the Phillip Ice rink as well (such as Broomball). As there is only one permanent rink in Canberra there has been limited potential for ice sports to grow.

Ice Skating and Ice Hockey compete for “ice time” and as the centre is privately owned and commercially operated as a combined swimming and ice skating facility, there is a need for the venue to generate revenue through casual skate sessions and social programs.

For ice hockey or ice skating to hire the rink the fees are around \$350/ hour.

Facilities

The privately owned swim/skate facility at Phillip is aging and user sports believe its age and lack of amenities are major constraints on hosting events.

In the winter, Canberra CBD Pty Ltd sets up “Skate in the City” for 1 month as a casual ice skating experience in Garema Place.

The Phillip facility is in need of refurbishment but sits in the middle of an area flagged for renewal as higher density living. Although the land and facility are privately owned - the Territory Plan requires the existing site to provide a pool and an ice rink as part of any development. There are no indications from the owner that reinvestment in the facility is planned.

Participation and Growth

Ice Skating report around 200 members and they host

2 interstate competitions per year. The sport runs a participation level “Aussie skate” but sees significant drop off at higher levels. This is partly due to the lack of ice access and struggle to find development and participation pathways. The rink is too small to conduct team skating and this also reduces the appeal to youth who favour social elements of the sport.

The Canberra Brave Ice Hockey team play in the Australian Ice Hockey League and have around 13 “home” games a year at the Phillip centre. Ice Hockey has built a strong following but the condition of the centre and lack of spectator amenity is a constraint.

Facility Issues and Future Plans

Ice Skating highlighted a number of issues with the current facility:

- ▶ Uncertainty over the future of the facility
- ▶ Facility is too small (Ice area) they really need a minimum 30x 60 m surface
- ▶ Facility is poor for events and has limited spectator capacity (really only designed as a recreational skating rink)
- ▶ There is no warm up rink, club storage or hospitality areas.
- ▶ Toilets and change are very basic and inadequate during peak usage
- ▶ No showers
- ▶ Numerous structural and equipment issues

Development of a new facility is strongly advocated by Ice Skating. They believe a modern two rink facility as part of an integrated facility would be viable with growth in ice skating and support from ice hockey training and events.

2.5.21 Other Indoor Sports

There are a range of other indoor sports that have facility needs such as combat sports and roller sports. Detailed investigation of these sports was not undertaken as the core focus of the study was the main indoor court sports and gymnastics. However discussions were held with a range of these to gain an understanding of the issues affecting these other indoor sports. The following groups provided information on their sport and indoor facility issues:

- ▶ Canberra Roller Derby League
- ▶ Varsity Roller Derby League
- ▶ Kung Fu Wushu
- ▶ Fencing ACT

Facilities

For martial arts and fencing there are a wide range of facilities suitable for their sport. As they do not need the ceiling heights of many indoor court sports there is far more availability of space for their activities. They currently use community centres, church halls, sports halls, school halls, program rooms and other indoor

spaces. Some martial arts will develop their own centre as a main base and then run smaller schools in hired venues. Fencing uses a range of spaces including dance schools, school halls, sports halls and church halls.

Canberra Roller Derby (100+ members) have used a number of facilities including school halls, industrial sheds, commercial sheds, Woden CIT, Woden Basketball Stadium, Southern Cross Tuggeranong, AIS and other indoor sports centres. Currently their main facility is Woden CIT which they use most week nights and some weekends. They are aware of the need to find alternative space with the pending closure of the Phillip 3 court centre and CIT.

Varsity Roller Derby are a growing sport (200+) with further potential for growth but access to facilities for their sport remains problematic. They have used both the Woden Basketball Stadium and Tuggeranong Southern Cross Centres. They have been working hard to find a new venue and have approached numerous schools to obtain a regular user agreement/ tenancy, but in ACT were unsuccessful. Varsity has now secured an agreement with Queanbeyan High School to be tenant users of the facility.

Participation and Growth

For Kung Fu there are about 300 participants with participation relatively stable. They have 7 full clubs (schools) each run by an individual. Mostly activities tend to be week nights with weekends used for competitions and grading.

Fencing has some clubs who are actively recruiting and are focusing on establishing the sport at schools. They do anticipate growth and are anticipating that they will continue to use a mix of centres to service growth. There are concerns for them that available space is limited and they hope that schools will be a good solution.

Canberra Roller Derby has around 100 competitors and run games every 4-6 weeks on Saturday nights. They believe the sport can grow if facilities are available and suggest the rapid growth in Varsity is evidence of this.

Varsity League has over 200 members and is growing. They believe there is capacity for growth if venues can be found. They now use the Queanbeyan school facility 5 afternoons a week, 1 night a week and Saturdays. Events/ competitions are held around 4-6 weekends per year. Their difficulty with accessing schools and other spaces in ACT could stem from perceptions of the sport as possibly damaging facilities and their spatial needs which require slightly more than a standard multi-use court. Training is often undertaken on substandard spaces and concentrates on skills development.

Facility Issues and Future Plans

As martial arts are far more flexible in facility choice and only need an appropriate floor surface and an area of around 15-20 m x 10 m, it does not appear there are any significant issues with availability of space. Concerns raised were associated with the cost of hire of spaces and management of some venues making last minute changes to availability which precludes planned programs or training. This issue was reported with school and university facilities and is likely to be associated both with communications and booking systems. Issues such as pricing and booking conflict are management concerns and do not indicate a shortage of available space.

Fencing would like to establish a permanent facility to accommodate training and competition events. This would include a single sports court with storage and toilets and the ability to host around 200 spectators. They believe such a facility would resolve new space needs for the next 5+ years and had hoped to achieve something at Lyneham. Even though this is a modest aspiration they would prefer to occupy a space as tenants not as owners. One of their stated issues was the difficulty in finding out what spaces are available and whom to contact to investigate availability. They have mentioned that some schools have very high charges and this makes it hard to use them.

Roller Derby need around 2 sports courts (40x 60 m) and spectator capacity for up to 500 to host events. The actual track needs to be 33m x 23 m. Training and skill development can take place in smaller spaces. The floor surface can be basic with smooth concrete acceptable for use and high ceilings are not required. This increases the opportunity for roller sports as other buildings such industrial sheds can be repurposed to support roller sport uses. Canberra Roller Derby is hoping to develop a cooperative strategy with other roller sports to investigate the leasing and operation of a permanent facility. If a suitable facility (such as an unused commercial shed) can be found they would then develop a funding strategy for necessary works to make it fit for purpose.

3 INVESTIGATION OF CURRENT FACILITY PROVISION

3.1 SUMMARY OF CURRENT SUPPLY

The current supply consists of a complex mix of public facilities, commercial facilities and school based facilities. The latter being difficult to assess as configuration of indoor spaces is not always readily available. Where it was clear that a full indoor court existed and that it was available for community use then this facility was recorded. A number of school spaces may be undersized for court sport but could support other activities. In general it is the policy of Education and Training Directorate to encourage community use of school facilities. Private and independent schools have mixed approaches with some not allowing external use while others will allow external hiring or only specific groups.

Feedback from many sports groups was that they found accessing school facilities difficult due lack of information, unclear contact points and a range of pricing and hire conditions that acted as a barrier to use. Universities and CIT also provide facilities with mixed approaches to allowing external use with some policy changes seeing space reconfigured to other uses and being effectively lost for sporting use.

3.1.1 Indoor Sport Courts

The following table summarises the supply of indoor sport courts which have some level of public access

Table 2 Indoor Sports Courts with some level of Public Access

Facility	No of Courts	Level of Public Access	Utilisation and Capacity
ACT Netball Centre	4	Full Access.	Fully utilised in peak hours with social netball the dominant user. Some week daytime capacity.
Active Leisure Centre/ Erindale College	1	Full access.	Mixed use centre with high use of single court both peak hours and day use (schools). Also has 5 x squash.
ANU Sports Centre	4	Limited- has anchor tenants, but likes flexibility for Uni needs.	Courts heavily used limited capacity. Also has 2 squash.
AIS	5 court hall (inc. show court) 2 court multi hall AIS Arena Combat Centre-sports area (also used for Futsal training)	Limited - constrained by AIS needs and regular hirers need to be flexible. Group hire (extended stay common). Arena available for event hire.	Courts are heavily used at elite level but regular use constrained by elite and event needs. Most users report unable to access the court hours they desire. Plans for the arena to be further upgraded as an event venue- likely to be delayed to 2018.
ACT Hockey Centre Lyneham	2	Limited to club run activities - accommodates ACT Volleyball and Indoor Hockey.	At capacity.

Facility	No of Courts	Level of Public Access	Utilisation and Capacity
Belconnen Basketball Centre	4	Full access.	Heavily used – mostly by Basketball. Peak hours at capacity. Good daytime use (schools and other programs). Planning to expand centre with Additional outdoor courts and possibly more indoor courts.
Belconnen Community Centre	1 (multi- limited size)	Full access.	Court allows undersized Basketball, 1 Volleyball, 2 Badminton. Well used for mixed range of programs. Limited capacity due to size.
CIT (Woden, Bruce, Reid)	1 Woden 1 Reid	Limited, requires high hourly rate \$100/ hr plus Public Liability of \$10M. Hours of availability subject to change without notice.	Court at Bruce has been converted to multi-use centre but no longer supports court sports. Woden campus will be closed soon. Reid is well used but there are displacement issues with changing CIT needs. (used by Badminton).
Kambah Indoor Sports	2 (synthetic turf)	Full- commercial centre running own programs. Accommodating indoor cricket, futsal, netball, volleyball.	Appears to be at capacity- well populated program.
Kaleen Indoor Sports	2 (synthetic turf)	Full- commercial centre running own programs. Accommodating indoor cricket, futsal, netball, volleyball.	Night use (6.00 pm onwards) weekdays appears strong also used Sundays. Centre is currently for sale.
Southern Cross Stadium - Tuggeranong	5	Full access.	At capacity - 100% use 4-10 pm weekdays and 9.am-7pm weekends.
University of Canberra	2	Public access / club hire programmed around Uni needs. Also has squash x 4.	Heavily used limited spare capacity and none in peak hours. Main uses badminton, futsal. No event capacity – no spectator capacity. Have a master plan for expansion but not yet funded.
Weston Indoor Sports	3 (Indoor Cricket)	Commercial facility- runs own social comps. Centre hire possible in down times. Only for indoor cricket, netball, volleyball etc.	Strong use but subject to centre programming.
Woden Basketball Centre (Southern Cross)	3	Club run facility (SCC) but leased from private owner.	Old facility which is still used by a range of sports. No event capacity and size issues make competition hard. Due for closure this year and SCC have no plans for replacement..

3.1.2 School Facilities with Indoor Sports Courts

The following list summarises the indoor courts at public and private schools

Currently available for public use (excluding Erindale which is included in the main facility tables).

- Schools with 1 indoor court 17
- Schools with 2 indoor courts 5

Not available for external use or unknown

- Schools with 1 indoor court 6
- Schools where indoor court status uncertain⁵ 21
- Schools with 2 indoor courts 3

3.1.3 Indoor Racket Sports (Squash, Table Tennis and Tennis)

Table 3 Indoor Centres servicing Squash, Table Tennis and Tennis

Facility	No of Courts	Level of Public Access	Utilisation and Capacity
ACT Table Tennis Centre	5 tables	Club Access.	Fully utilised in peak hours by club members. Some daytime use with aged programs and school programs. Facility in poor condition and needs renewal.
Active Living Centre/ Erindale	5 Squash	Full access.	
ANU Sports Centre	2 Squash		
Canberra Tennis Centre (new facility) and Next Gen Fitness	4 tennis 6 squash	Full access for tennis but will be in demand for programs. Squash play will be Next Gen club members only unless booked for/ hosting event.	New Facility – business planning suggests high use. Indoor tennis courts will only be used for tennis and modified tennis activities.
mpowerdome	8 (tennis)	Commercial Facility- main configuration is indoor tennis but several courts reconfigured for futsal, netball, volleyball etc. and other programs. Access to social play and to sports wanting court hire.	Very well programmed and utilised with broad and responsive range of programs. Plans for expansion and enhancement but not additional indoor court space. Strong capacity to accommodate events but need to resolve some parking constraints.
Tuggeranong Indoor Multi-use Centre (Tuggeranong Archery)	2+ tables	Mixed used centre with multiple configurations.	Supports fencing, table tennis, trampolining. Has some limited event capacity. Multi-use and need for reconfiguration makes it difficult for the centre to accommodate a permanent tenant sport.
Team Fitness Centre - Dickson	6 squash	Commercial centre- home to Dickson Squash Club. Social play for public allowed.	Heavily used. Largest club in ACT.

⁵ These schools are mostly primary school where the size of the indoor or covered court and availability was not confirmed

Facility	No of Courts	Level of Public Access	Utilisation and Capacity
University of Canberra	4 squash	Public and club use	At capacity for peak times and strong use out of peak. Have a master plan for expansion but are not funded.
Weston Ck Community Centre	4 squash	Public and club use	Some capacity- only 25% use Mon and Tues. At capacity Wed and Thurs. Event capacity poor as small no of courts and limited spectator room. Centre under investigation for relocation- continued provision of squash not confirmed.
Glass backed courts.			Centre is heavily used and supports major events. Limited additional capacity.
Woden Squash Centre	8	Full public and club use- managed by ACT Squash.	Campus/ student and staff use only.
CIT Reid	2 squash	Not available to public or clubs.	

3.1.4 Gymnastics

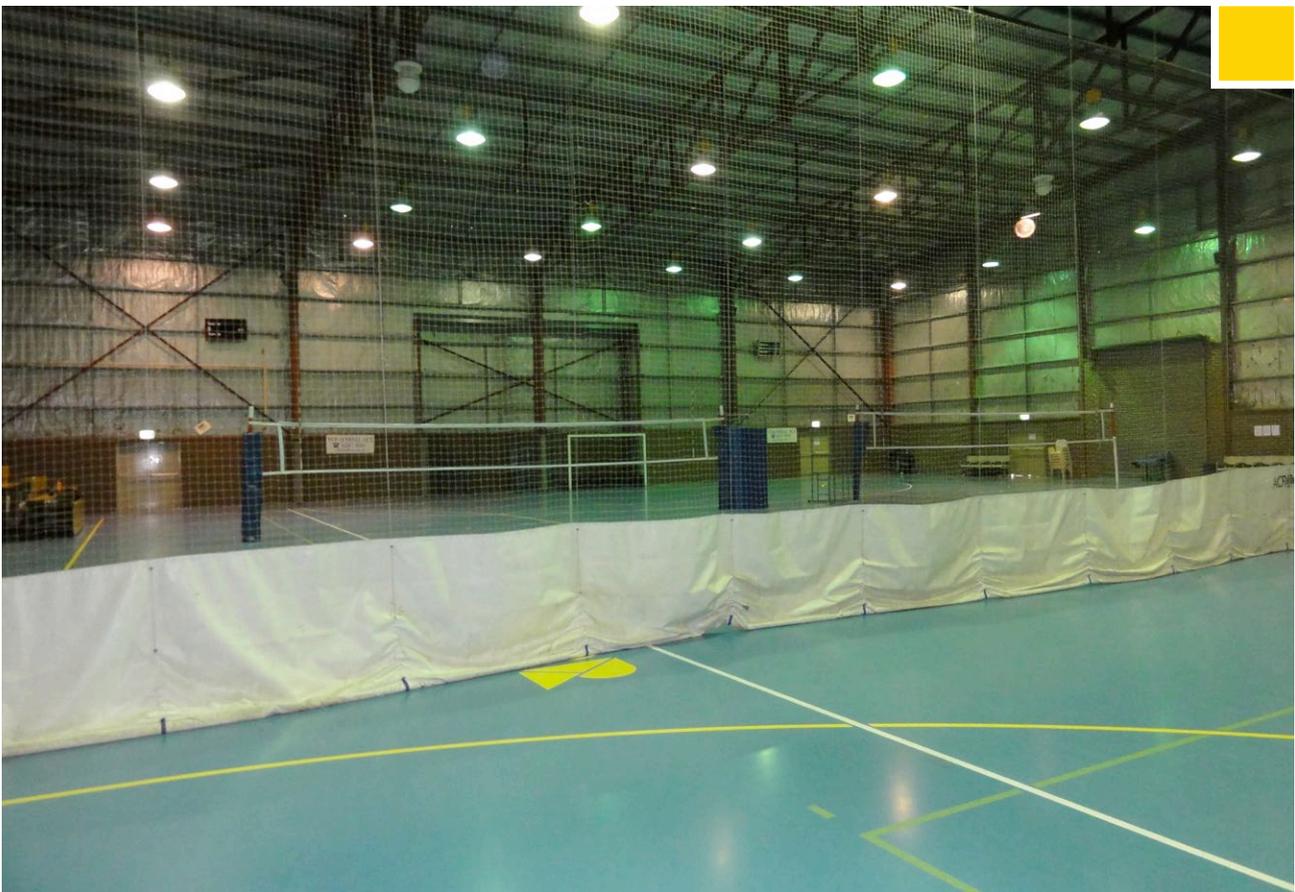
Table 4 Gymnastics Facilities

Facility	Size	Level of Public Access	Utilisation and Capacity
Canberra City Gymnastics (Belconnen)		Commercial gymnastics centre -purpose built	At capacity.
Woden Valley Gymnastics Club -Grant Cameron Community Centre (Weston Ck)		Gymnastics.	High usage.
Club also uses Tuggeranong Indoor Centre (Archery Centre) for Trampolining.			
Southern Canberra Gymnastics Club		Club managed facility.	
AIS Gymnastics Centre		ACT Gymnastics is able to hire for elite training and events.	Limited capacity to support sport.
Gungahlin Gymnastics		Commercial club in leased premises.	Gymnastics ACT report heavy use and latent demand.

3.1.5 Ice Sports

Table 5 Ice Sports Facilities

Facility	No of Courts	Level of Public Access	Utilisation and Capacity
Phillip Ice Rink and swimming Centre	1 rink	Full Access- private commercial facility	Ice time heavily used and strong competition for time between ice hockey and ice skating. Facility in need of upgrade.
Skate in the City (winter only)- set up in Garema Place -1 month		Commercial -1 month install.	Heavily used for casual skate and shows and demos.



3.2 POTENTIAL NEW FACILITIES (CURRENTLY BEING PLANNED OR CONSIDERED)

Under Construction

1. Coombs School (Molonglo) - two indoor courts, including community storage areas will be delivered as part of this new primary school. Construction of the school is expected to be completed ready for the start of 2016 school year (February 2016).
2. National Convention Centre - The ACT Government has purchased a portable basketball court surface to support elite level basketball (WNBL - Canberra Capitals) being played at the National Convention Centre Canberra in 2015. This will provide an additional mid-size show court to complement the AIS Arena.
3. Gold Creek Country Club (Nicholls) - A commercial indoor facility with three synthetic grass courts is under construction. Given the commercial nature of the facility, it is unlikely to offer any access for peak body competition delivery (i.e. Capital Football and futsal). The facility is expected to be completed in 2016.

Confirmed – Construction Yet to Commence

4. Belconnen Basketball Centre – Basketball ACT has confirmed it will add two outdoor courts to complement existing indoor court provision at the facility. Construction is expected to commence in 2016. They have also expressed an interest in developing additional indoor courts in the future.

Proposed Facilities

5. Preliminary planning activities for the Stromlo Leisure Centre have considered the potential provision of 3 indoor courts as part of this future facility.
6. Capital Football has been negotiating with EPIC regarding potential access to the Coorong Building which, in the past, was utilised as a 3 court basketball facility. This facility would need some refurbishment to be functional for futsal competitions, but does provide an interim solution to address some of the demand requirements for the sport, but the demands of event use at EPIC means that several interruptions through the year will occur. EPIC has identified a ten week period to host the futsal games, however, set up and set down work will be required to enable contracted events on the weekend during this period.
7. Capital Football's long-term facility solution for futsal is a purpose built 3-4 four court facility. This is consistent with the recommendations provided in their Strategic Facility Plan. Any planning for this facility will need to consider the ideal facility configuration (indoor and outdoor courts), location, cost, funding model and implications for existing facilities.
8. The University of Canberra is reviewing plans for expansion of their sports centre to add 4 more indoor courts and additional squash courts. Prior funding commitments for this facility were rescinded due to the change in federal government. However it is understood the University is actively exploring options to pursue the expansion.

3.3 LOCATION AND DISTRIBUTION OF FACILITIES

The following maps illustrate the location and distribution of current facilities

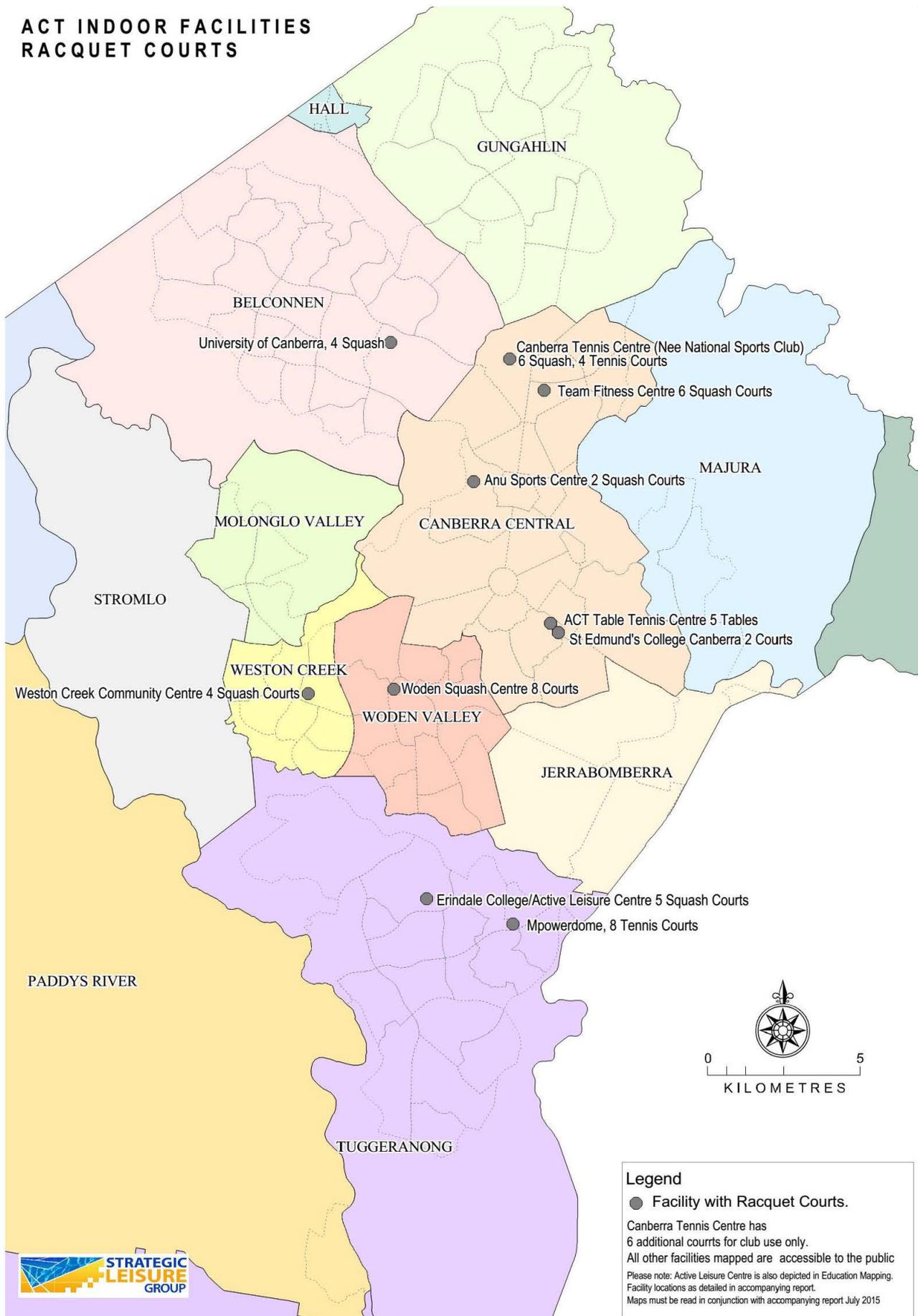
**ACT INDOOR FACILITIES
OTHER FACILITIES**



SCHOOLS & UNIVERSITIES



ACT INDOOR FACILITIES RACQUET COURTS



3.4 MANAGEMENT AND PRICING ANALYSIS

There is a high degree of diversity in management, pricing and access mechanisms for indoor centres in the ACT. This is compounded by the range of organisations managing existing facilities, their individual needs in regard to their own use and their revenue demands for viability.

3.4.1 Management

In general the management of existing Indoor facilities can be grouped into the following

Commercial

Commercial facilities are solely managed as a business and have a high responsiveness to the market as their viability depends on changing programs and offerings in response to trends. They often lead in introducing new social sports and other programs. They are unsubsidised but may develop relationships with anchor tenants (e.g. mpowerdome, Club Lime, Kaleen, Kambah, Weston). Commercial facilities are usually privately owned, although new hybrid models are emerging with publically funded facilities being managed commercially.

Club

Club managed facilities are focused on their primary sport as a priority and use social programs and other sporting hirers as a means of revenue generation. They may also establish permanent sub-leases or resident users. They can have a commercial focus but will often be seeking to subsidise the operation of their main sport (e.g. Belconnen Basketball Centre, Lyneham Hockey Centre, Lyneham Netball Centre). While club management models can be very successful they also represent a risk in that there are no guarantees a specific club (or sports association) will have the skills to manage an indoor facility sustainably. Changing committees, a dominant focus on the sport (not the venue) and internal politics can see club management fail. With a commercially focused facility there is a need to ensure maximum returns and market responsive operations. With club management, facilities can be underutilised as a particular club may be comfortable that there is sufficient income to operate and may not want the “bother” of supporting other users.

School and University

These facilities will operate with some subsidy from the institution and are usually managed around the needs of the institution as a priority and this usually precludes most daytime use. In some cases the institution may not want to make the indoor courts/ facility available to outside users and will rarely allow external hire. Other campuses may establish hire fees and conditions that can act as a significant barrier to external users, so they

offer community access “on paper” but use is limited due to the hire conditions.

In other circumstances the facilities are open for external use and are readily hired by a number of sports and other users. Many public schools make their indoor courts available for community use and many schools have strong usage out of school hours. The main concern reported by hirers is lack of certainty in regard to block bookings and requirements that they can be “bumped” with short notice if the school or university needs the centre.

When available for external use these school and university facilities are usually managed to recover operating costs and help subsidise the internal usage.

Many schools report additional advantages of making facilities available to the community, apart from providing revenue, community use is often found to reduce vandalism, increase community engagement and help address recreation needs of young people (reducing other social malaise).

Government

Government facilities are increasingly being run to recover costs and if possible return an operating surplus. This is a trend in many major cities and reflects decreasing commitments to subsidising community facilities and a greater appreciation of professional management. Generally there is some subsidy operating for public facilities even when the facility and management is leased out to a commercial or NGO (such as YMCA) provider. Examples include the AIS, Belconnen Community Centre, Weston Creek Community Centre and Gungahlin Leisure Centre. In the past it was common for a local government to build a centre and then contract out the management. Emerging trends indicate that many councils in large cities are reconsidering internal management approaches that use a “business unit” or similar structure to allow a commercial style management with all profits returning to the local government.

Hybrid

A number of hybrid models exist where a community based organisation or club operates a centre as a full commercial facility or has established a partnership that allows a commercial provider to run a centre on the clubs behalf (e.g. Southern Cross Club, Erindale Active Leisure Centre). The development of facilities may be supported by public funds (such as Erindale) but the transfer of management may include full transfer of operating costs and specific arrangements for profit distribution.

3.4.2 Pricing

Pricing varies significantly and, as identified earlier, is sometimes used as a mechanism to limit demand for court hours.

Pricing for commercial, community and club run facilities range from \$42/ hour to \$100/ hour with the average around \$60/ hour. However it is difficult to compare centres because some charge different rates depending on the sport being played. The AIS STF Centre charges \$65/ hour with the most expensive centre being CIT at \$100/ hour.

School court hire fees have a tendency to be higher than the market average. This applies to both private and public campuses. School court hire fees range from \$40/ hour to \$112/ hour. Many of the public schools that allow use quoted charges of \$100.80/ hour for weekday/ night use which is the “scheduled” maximum charge. However there are several that have developed lower rates or special agreements with regular users that reduces this cost. This scheduled maximum charge increases to \$112 for Sundays and some schools also charge a “call out” or staff fee associated with providing access. This can be due to campus design that does not readily make community use practical.

Some sporting groups reported additional barriers to use of school facilities such as high or complex insurance requirements.

Private schools are generally less likely to have public use but those that do have fees ranging from \$60 - \$75/ hour. One of these schools also indicated possible call out fee charges or minimum “1st hour” charges.

Independent schools hire charges range from \$35/ hour to \$100/ hour.

The following observations regarding pricing are relevant:

- ▶ Public Schools and CIT appear to be significantly above the market average and as many are single court facilities, this pricing seems to be at odds with the general market.
- ▶ The general market average (not including schools) is around \$55-65/ hour per court. However, the cheapest at \$42/ hour is for an undersized court.
- ▶ The high hourly rate being charged by schools may be seen by potential users as a price barrier and may be depressing potential use of these facilities, particularly for training use which, according to many indoor sports, is a major area of concern.
- ▶ Public School pricing structures are also impacted by poor design of some campuses and a need to recover costs for community use. Although there is general acknowledgement that school facilities should be available to support community sport, no specific funding or budget lines exist to support community use, such as the subsidies that occur for maintenance of sports fields.



4 ANALYSIS OF CURRENT AND FUTURE DEMAND

Current and future demand for indoor facilities arises principally from:

- › A younger population and higher rates of sporting participation in the ACT compared to other states.
- › Population growth (with Molonglo and Gungahlin being major focus areas over the next 15 years).
- › Trends for increased participation in social and casual sport and fitness related activity which increases demand for indoor facilities.
- › Successful strategies of some indoor/ court sports to increase participation with new modified forms of participation.

In assessing demand later in this study, the “reported” needs as documented by sporting user groups in this section were analysed in conjunction with a number of demand modelling tools.

4.1 SUMMARY OF SPORTS ORGANISATION FACILITY NEEDS

A summary of reported issues/ needs as expressed by sporting groups is summarised below.

4.1.1 Basketball ACT

- › Basketball ACT has doubled its membership in the last 3 years.
- › They are looking at investing further in its Belconnen facility by developing 2 outdoor courts and additional indoor courts.
- › There is demand for basketball but currently no access to facilities to expand provision.
- › Currently there is concern regarding demand in Woden-Tuggeranong particularly with the pending closure of the Phillip facility. However the focus of new demand is anticipated in Gungahlin and other future growth areas.
- › The current major issue affecting many clubs is access to training space and the only current solution is use of school facilities. However pricing and access structures in many schools discourage use (i.e. makes it uneconomical). Both public and private schools are reported as having “barriers” via pricing or other conditions.
- › Centres with 3+ courts will be needed in the future as facilities of this size are needed to efficiently support competition.
- › The closure of the Phillip facility will take a further 3 courts out of action and will create more demand.
- › Strong growth in juniors is possible but this demand will not be able to be serviced without additional facilities or some form of partnership with schools.

4.1.2 Futsal

- › Capital Football has undertaken a detailed study on options to meet court needs. The sport has significant latent demand and cannot get court hours in sufficient quantity or at multi-court centres to accommodate demand.
- › In recent time futsal has lost access to some centres (Netball Centre) and there is increasing competition for court hours in other centres. With closure of the courts at Phillip the issue will worsen.
- › The feasibility and business case undertaken by Capital Football has indicated that a dedicated futsal facility in a central location would be the best solution and would be a viable option in regard to operational costs. The major issue is access to capital funding to develop a centre.
- › The Feasibility Report found:
 - A lack of dedicated futsal facilities in the ACT is suppressing participation growth.
 - Significant shortfalls were found in the characteristics of existing facilities used for futsal in the ACT, including: pitch sizes; quantity of co-located pitches; line marking; impact resistance of walls, fixtures and fittings; court dividers; avoidance of spaces, surfaces and openings where balls can be stuck; and spectator facilities for major events.
 - Preliminary analysis suggests that an additional indoor facility dedicated to futsal and capable of supporting other indoor sports will be financially viable.
 - The preferred site for a new facility to service futsal is McKellar Park.
 - Recommended facility is a 4 court facility with either a single stage development or a staged development with the initial stage 2x indoor and 2x outdoor.

4.1.3 Volleyball

- ▶ Volleyball has seen 5% growth over the last few years and conducts competitions at two main centres (Lyneham and Southern Cross Tuggeranong).
- ▶ The major issue for clubs is access to court hours for training (at a reasonable rate).
- ▶ Future plans include possible development of beach volleyball facility at Lyneham.
- ▶ Upgrading the Lyneham facility is a priority (however the facility is owned and managed by Hockey ACT).
- ▶ There is potential for increased participation in population growth areas longer term and indoor court provision should consider volleyball needs.
- ▶ Regular and seasonally agreed access to school facilities for clubs, at a reasonable rate would make a significant difference.

4.1.4 Netball

- ▶ Netball has been growing and has had a deliberate strategy to invest in outdoor court district facilities.
- ▶ The indoor centre at Lyneham is fully used and has no capacity left.
- ▶ While there are no current plans for future indoor courts - the attitude at club/ district level is shifting and more demand for indoor court hours is emerging.
- ▶ All clubs will use some indoor courts for training and elite competition uses AIS and other centres.
- ▶ A large part of growing indoor court demand comes from social netball which may often be organised by an individual centre as part of centre programming.
- ▶ Netball Australia is developing a new format called "Fast Five" which will both grow participation level and lead into competition grades and even international teams.
- ▶ It is likely that over the next 10 years demand for indoor court hours to service netball will increase faster than just participation growth particularly with social formats. Netball also acknowledges they may have to consider changing the structure of competition and training hours to use existing facilities more efficiently.
- ▶ From a sport perspective, development of a centre at Gungahlin would be the next priority.

4.1.5 Badminton

- ▶ Badminton is very strong in Canberra, mostly driven by the high overseas population in universities.
- ▶ The sport is played at numerous venues and there is a considerable reliance on schools. Not many venues have sufficient roof height (9.2 m club and 12m international) for high level competition.
- ▶ The sport struggles with many venues as they change times and access often and there is increasing competition for court hours. Cost of some venues is also a major concern.
- ▶ Key venue issues include poor lighting and multi-

marked courts.

- ▶ Growth is expected and some clubs report constraints now due to lack of access to courts.
- ▶ Future facility needs are likely to be best served by on campus solutions in tertiary campuses (although the trend to charge for parking is a concern).
- ▶ Their ideal event facility would allow for 8 badminton courts (a 3 court indoor centre with courts at 36 m x 21 m would fit 9 badminton courts at 8 m x 18 m).

4.1.6 Gymnastics

- ▶ Gymnastics has a mixed model of delivery with some clubs run through commercial centres and others operating as community clubs hiring venue space.
- ▶ Staging events is a major issue for Gymnastics ACT with the only suitable venue (one that can accommodate spectators) being the AIS Arena. The cost of hire needs to include extra days for the set up and pull down of equipment and becomes expensive for the association.
- ▶ Gymnastics ACT can use the AIS gymnastics facility for training but need to work around AIS and the venue does not accommodate spectators.
- ▶ The new facility at Gungahlin is already under pressure and cannot meet demand .
- ▶ From Gymnastics' perspective the main need is a venue that is centrally located; and can accommodate up to 1000 spectators. The gymnastics arena at AIS is suitable for training but is not designed for events. A dedicated headquarters venue is required that provides events venue and allows for the full range of disciplines (artistic, rhythmic, trampoline etc).
- ▶ The cost of facilities is an issue for some clubs with Woden Gymnastics paying \$70,000 per year.
- ▶ ACT Gymnastics has prepared a strategic facilities plan that identified the following priorities:
 - A new facility at Gungahlin (demand outstripping supply and expected to continue to rise). Immediate attention should be given to exploring options to improve gymnastics supply in the area. Private providers should also be involved in these discussions.
 - A Customised State Gymnastics Centre (which can also include club based facilities for overflow activities) is required. Preferred location is Weston Creek green field space. Alternative locations are described as Majura Business Park or UC Sports Hub.
 - Security of tenure at Woden Valley Gymnastics Club needs to be assured because of the projected growth in Molonglo and the fact that it is a "...vital part of the club network for gymnastics and needs to be retained long term".
 - Discussions should commence with the adjoining lease holder to Canberra City Gymnastic Club to discuss the option of extending CCGC's eastern

lease boundary to expand its facility for a boys/ men's pit area.

- Gymnastics ACT needs to be a major stakeholder in the planning of both new and updated school facilities to allow for feeder activities to secure quality spaces with long term commitments in school settings.
- With Mitchell becoming a dynamic industrial hub, the option of a warehouse conversion should be explored, particularly for recreational gymnastics programming. Presumably seeking a private provider to lease a warehouse for rec gymnastics.
- Retrofitted venue options should be explored at older school sites for smaller private providers across Canberra, offering a financial return to the school for vacant spaces and a practical option for private providers.
- The rapid growth of the Majura Business Park and its recognition as a central transport/ employment hub warrants it to be explored as a possible location of a community venue suitable for gymnastics. Discussions would need to be held with the Airport Group to progress this.

4.1.7 Hockey

- ▶ The major issue for Hockey is the need to invest in the Lyneham centre with proposed improvements and refurbishments estimated at \$2.3 million. To fund these improvements a better revenue stream is required.
- ▶ There are approximately 1000 participants in the summer indoor competition. Numbers have been stable and there is limited capacity to grow without an additional indoor venue. Teams report difficulty getting access to court hours for training but as the indoor competition is more social not all teams are looking for training space.
- ▶ The possible introduction of a modified version of the game to drive participation may increase indoor demand.
- ▶ Normal format indoor would not be viable as a basis for operating a new indoor facility. Hockey would like additional access to indoor courts in growth areas and Tuggeranong, but are not in any position to own or operate a facility.

▶

4.1.8 Squash

- ▶ Squash is a strong sport in Canberra with a number of clubs operating across 7 centres.
- ▶ There has been a decline in court numbers in the past and many centres have closed, however a clearer model of viable provision has emerged that suggests a large central facility accommodating events supported by a number of smaller facilities provided as part of a multi-facility centre, should be considered.
- ▶ There are concerns that courts will be lost in the redevelopment/ relocation of the Weston Creek Community Centre and that the Dickson Club's courts at Team Fitness may not be secure.
- ▶ Squash undertook a Strategic Facilities Plan in 2014 which recommended⁶:
 - That the Government provides an undertaking that no current courts in government owned facilities will be lost, unless other courts are built in the same vicinity.
 - The ACT Government imposes conditions on any redevelopment of the Dickson facility (currently known as 'Northside Fitness Centre') so that any redevelopment requires a multi-purpose sporting facility to be built, on-site or nearby, complete with 6-8 squash courts.
 - ACT Squash initiates discussions with the owners of the proposed 'Next Generation' multi-sports facility to be established in Lyneham to ensure that social and competitive squash can be played without the need for squash players to become members of the multi-sports facility. ACT Squash advises the ACT Government of the outcome of these discussions.
 - The ACT Government notes that proposed Stage 2 enhancement of the University of Canberra multi-purpose indoor sporting facility could include 8-10 squash courts, which could partially offset any impending loss of Dickson Squash Centre.
 - The ACT Government includes 6-8 squash courts in any multi-purpose sporting facility to be built within the Gungahlin area.
 - The ACT Government proceeds with redevelopment of the Weston Creek facility only if 6-8 squash courts are included with any multi-purpose sporting facility to be built in the Molonglo area, understood to be in Coombes or Wright.
 - The ACT Government will assist ACT Squash by loosening the existing controls required to develop the Woden Centre site."

⁶ The ACT Government has provided a response to ACT Squash regarding these recommendations

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4.1.9 Table Tennis

- ▶ ACT Table Tennis is playing in an old building in Kingston which accommodates 5 tables.
- ▶ A recent building assessment (2014) found that:
 - The building has reached the end of its serviceable life.
 - Repairs are no longer economically viable with a number of structural issues including asbestos, differential settlement of foundations and the numerous works required to make the building suitable.
 - It would be better to replace the building as opposed to refurbish.
- ▶ The existing centre is well used and supports daytime programs for schools and elderly.
- ▶ The club recognises that a purpose built facility would be the best solution but they would be financially unable to fund the capital.

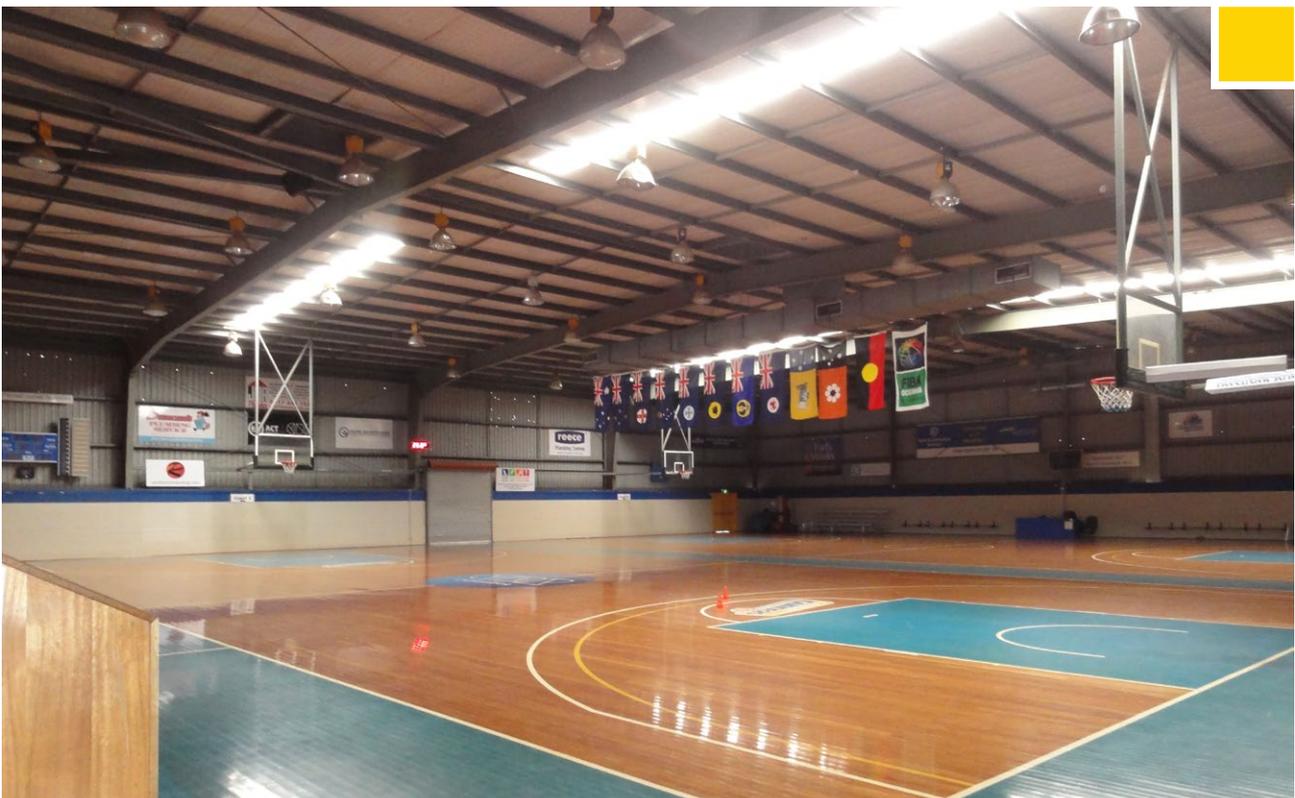
4.1.10 Ice Skating and Ice Sports

- ▶ Ice skating facilities are not normally provided by the public sector. Like bowling alleys, roller skating and laser tag, they are normally provided by the private sector as commercial facilities.
- ▶ For Ice sports venue options are problematic as there is only one facility in Canberra which is a privately owned aquatic and ice sports facility.
- ▶ The current facility is ageing and does not meet competitive needs of Ice skating.

- ▶ Competition for ice time has got worse with the growth in ice hockey.
- ▶ Although the Territory Plan requires any use of the current site to include a pool and ice rink this may become problematic as pressure for residential development in the areas increases making commercially viable models for a pool-ice rink facility less likely.
- ▶ Ideally ice skating would like a new facility to be built that provides two ice rinks and then can accommodate all the needs of the various ice sports as well as support major competitive events.
- ▶ Any new facility would not need to be located at Phillip and could be established in an area where land values are less likely to constrain feasibility.
- ▶ Detailed investigation will be required to see if there is a viable model for provision of a new Ice facility as part of a multi-use facility.

4.1.11 Other Indoor Sports

- ▶ Roller Derby will be impacted significantly by the loss of the 3 courts at Phillip and the Closure of the CIT Woden court. Canberra League believes there would be benefit in roller sports coming together to investigate establishment of a permanent facility in an industrial/commercial shed or similar.
- ▶ Fencing and Martial Arts will continue to need access to space for their sport and as the population grows a combination of school and other facilities will probably meet needs.



4.2 POPULATION AND PARTICIPATION BASED DEMAND ASSESSMENT

4.2.1 The Demand Assessment Model

Predictive models for land/ facilities for sport and recreation frequently rely on benchmarks whose historical basis is problematic. Such benchmarks typically do not assess the carrying capacity of land/ facilities as a guide to future provision. To address this issue Strategic Leisure has developed a Demand Analysis Model to provide two key planning outcomes:

1. A more quantitative means for establishing the actual range of sporting facilities required to meet community demand; and
2. A predictive model for future provision planning.

The “model” uses statistical and other data and is based on:

- Statistical participation data from ERASS⁷ / CRG (ACT 2011 and 2012 data).
- ABS statistical participation data derived from a three yearly survey on children’s participation in sport and leisure (most recent, April 2012)⁸.

The model is not intended to be a prescriptive tool for identifying current and future needs. Rather it provides an additional reference point for decision making which adds to other research such as observational needs, existing plans and consultation findings.

4.2.2 Projection Method

Population and Participation Data

The model separates the population into children (5-14 years) and adults (15-64 years). Persons aged 65 and over are not included in the analysis as participation rates in that age cohort decline rapidly. Participation data (using ERASS/CRG results for Adults and Children’s Participation Data for 5-14 Years) is then entered based on available data for the age cohorts. Population projections, adjusted for predicted percentages within the relative age cohorts, are factored into the model. Once calibrated, the population and participation data drives the model and can provide the following:

- Estimated participation in different sports.
- Aggregated results for facility/ sport groupings.
- Estimated use of facility types and facility groups.

For future projections demographic projections are used and adjusted for expected percentages of the relative age cohorts.

Facility Capacity Assumptions

The model is also adjusted for a set of assumptions which estimate the capacity of a specific facility type by defining participation numbers for an average week, considering peak demand times and likely modes of participation.

In brief, the model then calculates likely participation (or demand) based on current participation figures and then estimates how many particular facilities are needed to accommodate that demand.

4.2.3 Limitations and Constraints

The outputs of the model are broad and due to the variations in survey methodology and detail in data sets for individual communities the confidence in the outputs will vary. However the model works well in conjunction with other research methods and allows for comparison with other results (triangulation) as well as providing another perspective on predicting demand and facility needs.

The model, if fully calibrated, can be used to check adequacy of existing provision as well as land and facility types needed for future provision. However future trends in participation become increasingly uncertain over time. In other words, the further into the future predictions move - the less certain the possible outcome is, as too many variables affect participation choices. Another issue is that current participation figures used to build the model may be impacted by a lack of facilities and will not reflect latent demand.

For example; there may be significant latent demand for a particular activity due to a lack of appropriate or accessible facilities to accommodate that activity. If there is no opportunity to participate, the current figures will identify a low participation rate for that particular activity and would then continue to support the notion that there is no requirement to cater for that demand.

⁷ Australian Sports Commission. Standing Committee on Recreation and Sport. “Participation in Exercise, Recreation and Sport Surveys (ERASS)” was replaced by the CASRO (Committee of Australian Sport and Recreation Officials) Research Group who in partnership with ABS produce biennial physical activity survey data. There are some issues with the new sampling methodology and some data is not easily compared over time. The model uses participation data for ACT (2012) generally but in some cases where 2012 data was not available 2011 data has been used.

⁸ ABS. Children’s Participation in Cultural and Leisure Activities, October 2012. Note: The model uses participation data for Australia as a whole as state and regional participation figures are not available. There may be variations at the local level.

Comparison with regional or state figures is one way to identify this potential fault and some “interpretation” of data may be required to adjust the model in these instances.

The model has been designed to group or aggregate data to create a more robust result. This means that the output for “indoor sports” or other groupings would indicate demand for a range of uses and a need that applies to the “group” of indoor sports for spaces that are capable of being used by multiple activities. This aggregated result is more useful given the uncertainty of future participation trends at an individual sport level.

For example, while we can be sure there will be continued participation in indoor sports we are less sure which particular sports will fuel that demand. Trends can give some guidance but these can change over time.

4.2.4 Facility Capacity and Demand

Estimating demand is always difficult as participation patterns can shift over time. However, averaging out demand/ participation for higher level grouping can provide more confidence. Two methods are commonly used for sports facilities:

3. Estimation of formal sport demand through anticipating team numbers and the capacity of facilities to host the peak demand of competition games.
4. Estimation of social, training and competition use of facilities as an average number of hours the facility can host use multiplied by the average number of participants per hour.

While either approach will provide an indication, the latter approach has been used to reflect that there is increasing demand for social and casual modes of sport participation and that sports are also increasingly looking at modified rules and competitions as well as more social programs. This means that anticipated hours may spread across weekdays and nights and the traditional peaks experienced around a single week night or weekend day may be replaced with more dispersed demand patterns.

4.2.5 Demand Assessment Model Outputs

Based on application of the model to estimated populations⁹ the following demand is identified:

Facility Type	2015 Demand (394,675)	2020 Demand (423,950)	2030 Demand (487,413)
Facility Type	2015 Demand (394,675)	2020 Demand (423,950)	2030 Demand (487,413)
Indoor Sport Courts (incl. B'Ball, N'ball, V'Ball, I/ Hockey, I/ Cricket and Futsal)	42 courts	44 courts	49 courts
Squash	23 courts	25 Courts	28 courts
Gymnastics	4.5 facilities	5 facilities	5.5 facilities
Table Tennis	18 tables	20 tables	22 tables

Note: participation data for Ice sports, Fencing, Roller Derby and others have high errors due to the small sample size. It was not possible to separate out any reliable trend data with and therefore it was not modelled.

⁹ ACT Population Projections Medium series 2013 edition

4.3 POPULATION STANDARDS BASED DEMAND PROJECTION

Population Standards use a broad projection of provision based on a catchment population per facility. Standards are often adopted from published guidelines or based on levels of current provision. They offer an alternative way of predicting demand.

4.3.1 Current Provision

Based on current provision and including just the public courts and excluding school based courts which are often constrained in their availability the following provision standard applies:

44 courts (including mpowerdome and indoor cricket centres but excluding ACT tennis) for a 2015 population of 394,675 **suggests a current standard of 1 court per 8970 persons**. However this rate does include a number of limited function courts and may overstate the case. When the Woden CIT court and the Phillip Indoor 3 court are closed that would reduce the provision rate to around 1 court per 10,000.

Equally it should be acknowledge that there is a reported shortage of court space (in multi-court centres).

Provision rates for Squash and Gymnastics are:

- 1 squash court per 12,334 persons
- 1 gymnastics facility per 78,935 persons

4.3.3 Demand Projection Using a Standards Approach

Based on the above information a standard of 1 court per 9,000 persons for court sports would not seem unreasonable. For Squash and Gymnastics, the modelling suggests a provision ratio of 1: 13,000 and 1:79,000 respectively. On this basis current and projected facility needs would be as follows:

Table 6 Demand Projection using Standards

Facility Rate	2015 Demand (394,675)	2020 Demand (423,950)	2030 Demand (487,413)
Indoor Courts (1: 9,000)	44	47	54
Squash (1: 13,000)	30	33	37
Gymnastics (1: 79,000)	5	5.5	6

From work undertaken by Strategic Leisure for the Gymnastics Queensland State Facility Plan, an average ratio of provision throughout the state of one facility per 10,100 persons aged 0-19 years was calculated. For ACT, based on 2015 population estimates, there are an estimated 97,000 persons aged 0-19 years which would translate to a need for 9-10 facilities. This is of course much higher than the current number of facilities in the ACT, but could be an indicator of latent demand for this sport.

10 Undertaken by Parkland Planners in association with Strategic Leisure Group

11 Sport Facility Provision- Research Report Nov 2014 (Vic Uni ISEAL)

4.3.2 Comparison with Other Standards

In a number of studies undertaken in Queensland and NSW, Strategic Leisure Group has often found that use and demand analysis in other metropolitan councils has suggested a range of **about 1 indoor sports court per 11,000- 15,000**.

Provision Guidelines in WA (PLAWA guidelines August 2012) suggest a 3 court indoor sports facility per 50,000- 100,000 persons- which equates to around 1 court per 16,000- 30,000 persons.

Recent work for the City of Sydney Sports Facilities Strategy has indicated an existing provision rate of around 1 court per 9,500¹⁰.

A 2014 research report by Sport and Recreation Spatial found that for metropolitan Victoria there was 1 court per 10,648 persons¹¹. The research also found there was a direct correlation between the number of courts and participation, meaning that those LGA's with more courts had the higher rates of participation.

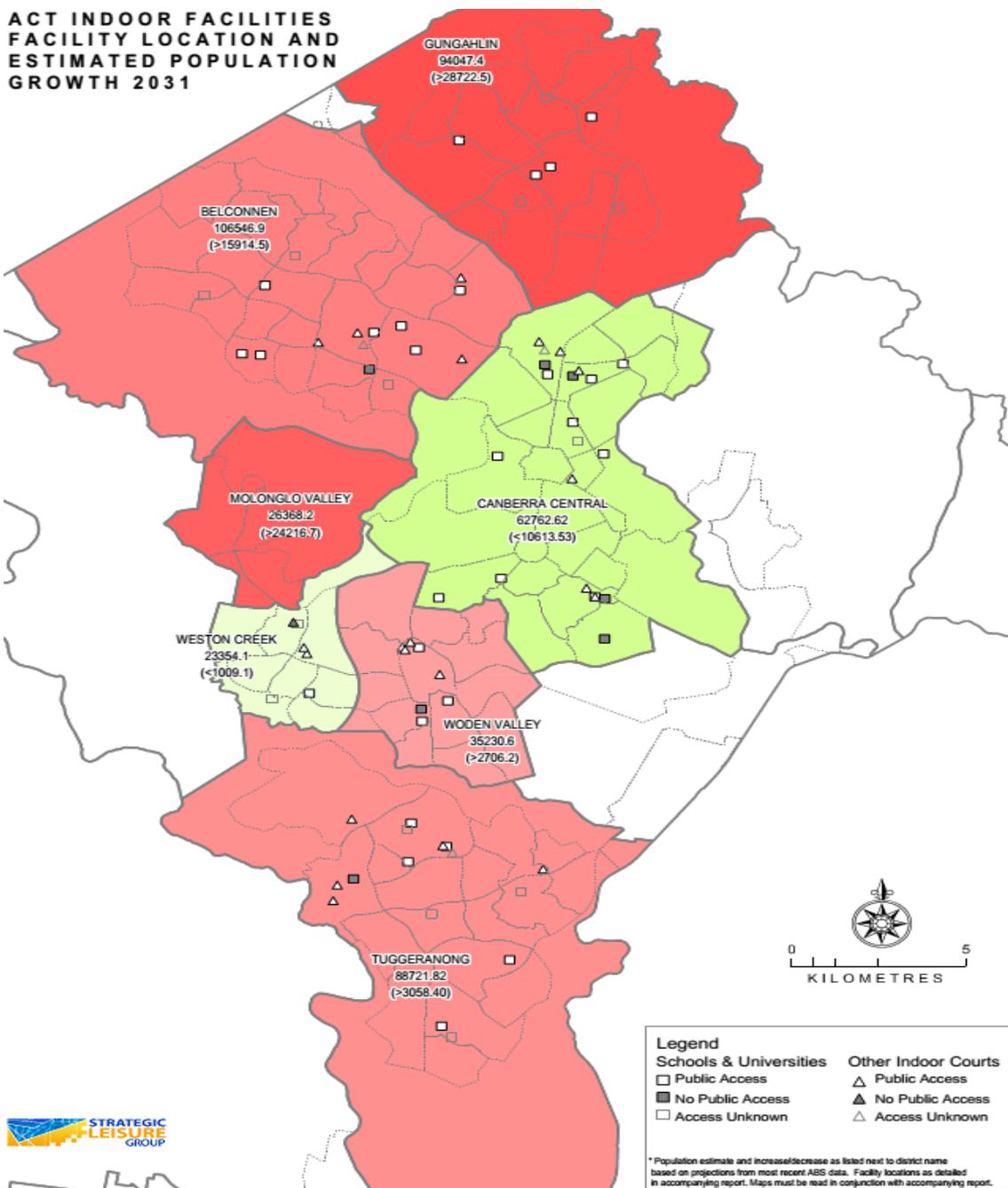
From ERASS data it is evident that there is a higher rate of sporting participation in ACT, which combined with climatic factors, would support higher than average demand for indoor facilities. In addition, the reported growth in sports such as futsal and reported inability of sports to access court hours to cater for existing demands suggest that current supply of indoor courts is inadequate.

4.4 POPULATION GROWTH AREAS AND FACILITY CATCHMENTS

4.4.1 Current Major Growth Areas and Facility Planning

The major growth areas of Gungahlin, West Belconnen and Molonglo are currently under development and planning phases. Apart from the proposed facility at Stromlo and the Club Group's proposed Indoor Cricket Centre at Gold Creek no other confirmed plans for provision of indoor centres currently exists. Population growth in these centres is likely to warrant additional plans. Growth in North Canberra is more likely to be able to be serviced from existing facilities.

With a lack of spare capacity in nearby/ available facilities, population growth in these areas would suggest a need for provision of new facilities



5 ASSESSMENT OF SUPPLY AND FUTURE PROVISION PLANNING

5.1 SUMMARY OF CURRENT PROVISION

Summarising provision needs to consider the flexibility of different facilities and the ability of different sports to use indoor court and facility types. Futsal is able to use a wide range of indoor facilities while Basketball has more specific playing surface requirements. The summary below identifies the different types of playing surface and format.

Table 6 Demand Projection using Standards

Type	Public/ Commercial	Schools (available for use)	Can accommodate	Notes
Indoor Sports Courts (suitable for Basketball and Netball)	29	27	Basketball Netball Volleyball Badminton Futsal	Woden CIT court may close soon and Phillip 3 court facility is due to close this year. Includes Lyneham hockey and netball centres
Indoor Cricket/ Indoor Tennis Multi use ¹²	15		Social netball, Indoor cricket, Indoor tennis, Futsal, Volleyball	Includes Belconnen community centre which is undersized. Includes mpowerdome and ACT Tennis
Squash	32		Squash	Erindale counted as public not school
Gymnastics				Includes AIS
Ice	1 rink		Ice Skating	
Table tennis	1 centre 5 tables Shared centre 2+ tables		Table Tennis	Includes the Tuggeranong Indoor multi centre (archery)

¹² Excludes the ACT Tennis centre as the indoor courts will not be used for anything else

5.1.1 Adequacy of Current Provision

Based on the Background Research (Section 4) and the Investigation of Current Provision (Section 5) there are a number of issues affecting the adequacy of provision including, availability of courts, cost of courts and configuration (suitability) of courts for various sports. In an overall sense, an adequate level of provision would mean that all user groups could access the amount of court hours they would like at a sustainable cost.

Adequacy of provision is further complicated by peak demand times - those times generally outside of work and school hours when all the various sports are vying for access.

From the analysis of current provision and use, feedback from sporting organisations, and discussions with venue managers, the following general observations emerge:

1. Most court sports (including squash and badminton) believe there is a shortage of court hours available for training and social play.
2. Many court sports indicate there is a major shortage of access to multi-court centres which can support sustainable competition.
3. Some sports, notably Futsal, Basketball and Volleyball believe there is latent demand that cannot be accommodated due to a shortage of available court hours.
4. The existing "home of Table Tennis" in Kingston has reached the end of its life and further investment is not recommended. An alternative venue is needed.
5. Gymnastics ACT have identified a need for a new facility (or expansion of the existing) to service growth in the north and would like to develop a permanent events facility for Gymnastics and affiliated sports.
6. The pending loss of the 3 court centre at Phillip and the court at Woden CIT will exacerbate the shortage of court hours.
7. Ice sports have expressed dissatisfaction with the existing privately owned and commercially operated facility due to limited amenities and difficulty of accessing sufficient "ice time". They do not believe it is possible for ice sports to grow further without a more modern facility.
8. The current level of squash provision is likely to become insufficient as populations grow in Molonglo and Gungahlin. The loss of any existing courts would have significant impact on the sport.
9. School indoor courts are an important resource which could make a significant difference to meeting training needs for many sports. Many clubs already use school courts and many others have indicated a desire to use school facilities. Implementing strategies that improve awareness of and access to, these facilities should be a priority.
10. The current distribution of multi-court indoor facilities provides a reasonable level of access in terms of travel times, with the exception of the main growth areas of Molonglo and Gungahlin. Access to centres with two or more courts is very limited in these growth areas. In addition, provision in the south and near Molonglo will decrease significantly when the CIT and Phillip courts close.

Figure 4 Facility Location and Current Population

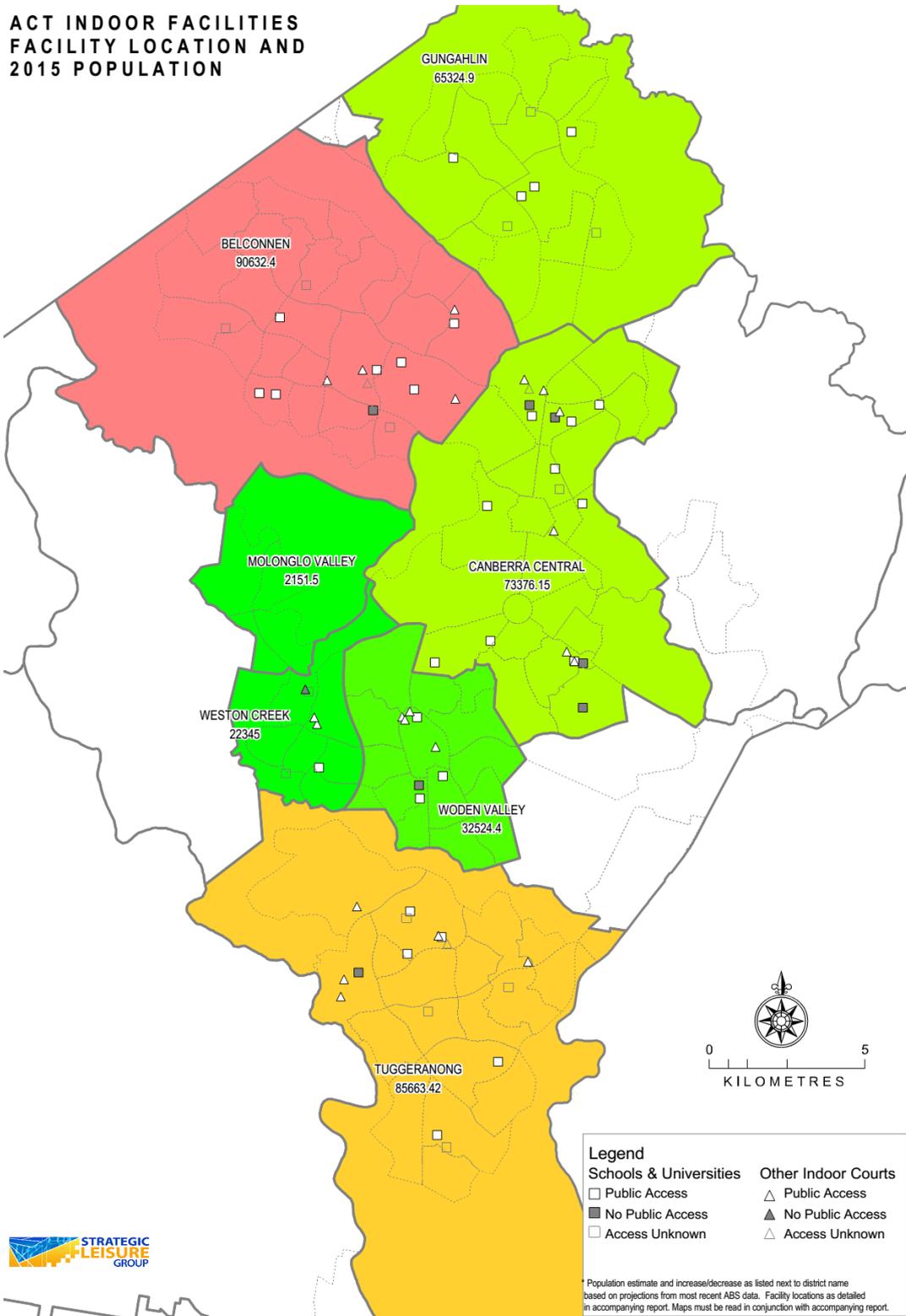
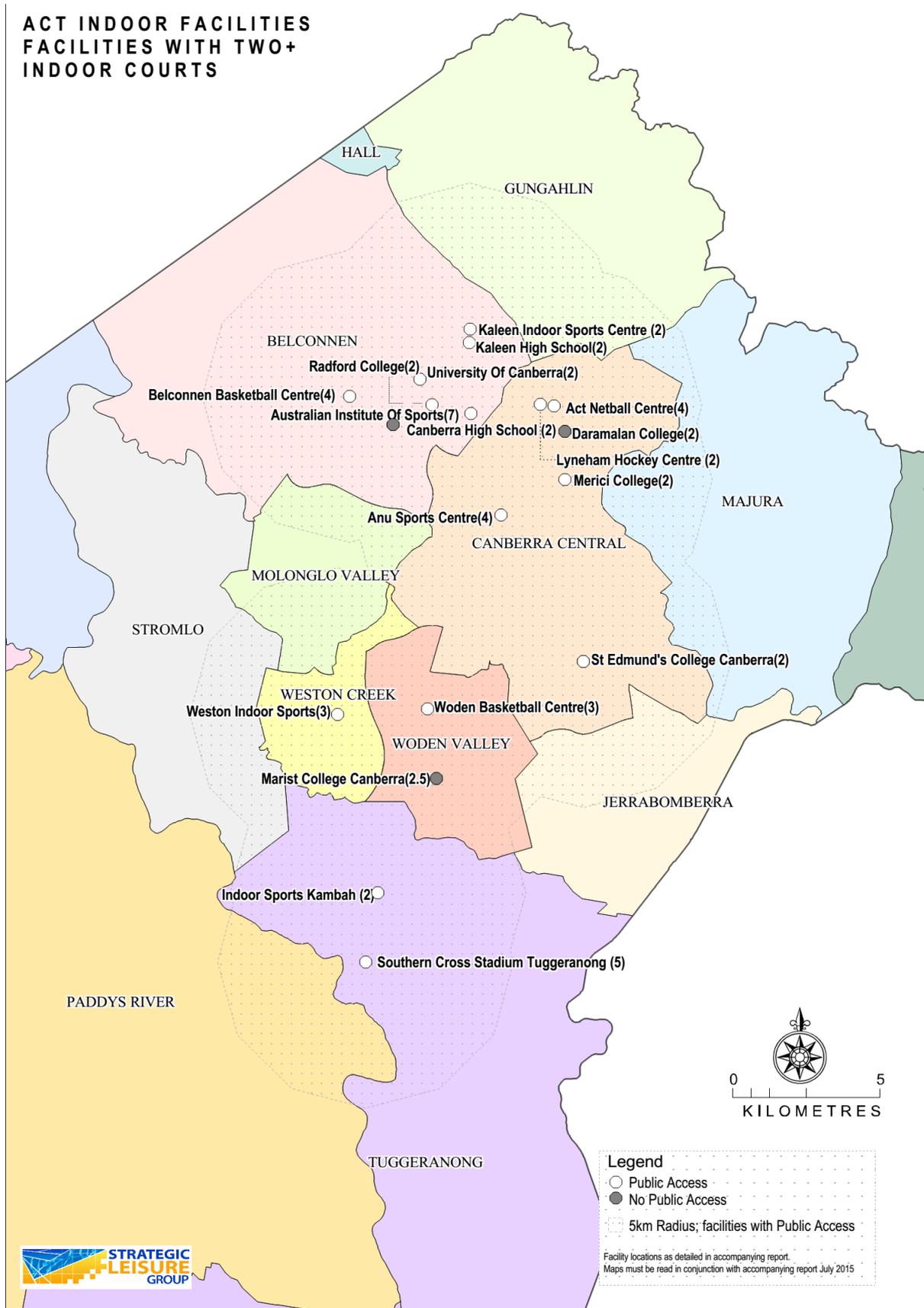


Figure 5 Catchment Radius for Facilities- 5 km



5.2 SPORTING ORGANISATION'S PROJECTED FACILITY NEEDS

The following table summarises the projected facility needs over the next 10 years as perceived by sporting user groups and the Territory Sport Organisations.

Figure 5 Catchment Radius for Facilities- 5 km

Sport	Territory Sports Organisation	Clubs and Others
Basketball	<ul style="list-style-type: none"> ▶ Access to school courts for training. ▶ At least 2 more courts at Belconnen. ▶ 3-4 new courts in Gungahlin. ▶ 3+ courts at Molonglo. 	<ul style="list-style-type: none"> ▶ More indoor facilities in growth areas. ▶ Additional 2-3 court facility at Lyneham. ▶ Access to more school courts for training.
Netball	<ul style="list-style-type: none"> ▶ Demand for indoor courts expected to grow as districts move towards more indoor. ▶ Additional courts at Lyneham Centre. ▶ New indoor. Outdoor complex at Gungahlin. ▶ Access to indoor courts (schools) for training. 	<ul style="list-style-type: none"> ▶ Indoor courts in Woden district (Deakin) that can be used for regular training (representative teams).
Futsal	<ul style="list-style-type: none"> ▶ Access to court space for training. ▶ 4x new indoor courts - preferably in Belconnen/ North Canberra/ Gungahlin. 	
Volleyball	<ul style="list-style-type: none"> ▶ Access to courts for training. ▶ Upgrades to Lyneham indoor courts. ▶ New indoor courts in growth areas (Gungahlin, Molonglo, Belconnen). 	<ul style="list-style-type: none"> ▶ More indoor courts/ access to affordable courts. ▶ New courts at Gungahlin/ North Canberra.
Badminton	<ul style="list-style-type: none"> ▶ More court access- can use single court facilities so more school courts available. ▶ New courts on tertiary campuses best solution. ▶ A 3 court facility (9 x Badminton) which supports events. 	
Gymnastics	<ul style="list-style-type: none"> ▶ Dedicated Facility for Gymnastics in ACT capable of supporting all disciplines and events. ▶ Lyneham/ Gungahlin location. ▶ Access to school halls to run Gymnastics for All Programs. ▶ Expansion of floor space at existing clubs. 	
Squash	<ul style="list-style-type: none"> ▶ 6-8 new courts in Gungahlin ▶ Need to retain courts at Dickson. ▶ 6-8 new courts in Molonglo if courts lost at Weston Ck. 	<ul style="list-style-type: none"> ▶ At least 4-6 more courts including some "doubles" courts. ▶ Should expand courts at University of Canberra.
Hockey	<ul style="list-style-type: none"> ▶ Upgrades to the Lyneham centre. ▶ Access to school courts for indoor training. ▶ New indoor courts in growth areas of Molonglo and Gungahlin. 	
Table Tennis	<ul style="list-style-type: none"> ▶ New table tennis facility able to accommodate 8-10 tables and host events. ▶ Existing facility at end of life. 	
Ice Skating	<ul style="list-style-type: none"> ▶ New 2 rink Ice Sports Centre. 	
Combat Sports	<ul style="list-style-type: none"> ▶ Access to new spaces ▶ Permanent Fencing Centre (as part of multi-user facility). 	
Roller Sports		<ul style="list-style-type: none"> ▶ Alternative venues to loss of Woden Basketball Stadium and Woden CIT - possibly a dedicated roller sports venue established in an industrial shed. ▶ Improved access to school courts.

5.3 SUMMARY OF FUTURE DEMAND

Based on the analysis undertaken in Section 4.1, 4.2 and 4.3 and in consideration of both expressed and modelled demand, the following facility provision should be considered for 2015, 2020 and 2030.

Figure 5 Catchment Radius for Facilities- 5 km

Facility	Current Needs	Additional by 2020 Growth approx. 30,000	Additional by 2030 Growth (20-30) approx. 64,000
Indoor Sports Courts	At least 1 new 3+ court commercial indoor centre. in Gungahlin Additional courts to replace loss of 4 Courts at Phillip ¹³ or release of capacity in other facilities to accommodate the displaced uses.	1 new 3+ court commercial centre in Molonglo Design and construction of new indoor facilities at government schools to support community use through multi-purpose design and provision of storage for users.	1 new 3+ court commercial centre to be located in a growth area where feasibility has been tested. The provision of community accessible facilities at schools in Gungahlin, Molonglo and possibly West Belconnen will augment supply.
Squash	Current provision meets the needs of the sport	2-3 new courts as part of a commercial facility.	3-4 additional courts as part of commercial facility. Alternately a new 6-8 court centre as part of a large commercial sport and recreation centre could be more viable than two smaller ones.
Gymnastics	Current unmet demand might be accommodated with expansion of existing facilities and the increased use of school facilities.	A new club facility to service growth areas is warranted. Consideration should be given to development of a state/ regional competition and training facility	Depending on capacity of expanded or new facilities a further facility may be required. Further development of school-gymnastics partnerships may meet increased demand.
Table Tennis	Needs being met but current facility at Kingston at "end of life".	Table tennis could be located as a permanent tenant at another facility while also securing regular access to secondary spaces including school halls.	
Ice Sports	Existing privately owned commercial facility considered inadequate by Ice Sports. Their preference is to replace with a modern ice facility better accommodating multiple sports and ice sport events.	Ice Sports to should be encouraged to explore private investment and redevelopment opportunities. The ACT Government should consider any genuine development proposal from the market that may result in an improved facility for ice sports being developed.	

13 Woden Basketball Stadium and CIT)

Facility	Current Needs	Additional by 2020 Growth approx. 30,000	Additional by 2030 Growth (20-30) approx. 64,000
Other Indoor Sports	Most have sufficient access to facilities for current demand. But Roller Derby has struggled to secure ongoing suitable facilities. One club moving to a Queanbeyan school and the other looking for a lease space in commercial/ industrial areas.	Additional capacity will be needed in line with population growth. This can probably be serviced with access to other indoor and multi-use spaces and use of current and future school centres. With the exception of roller Derby many of these sports are able to share facilities or be “permanent” tenants in part of larger facilities. Design of future indoor facilities at schools may want to consider suitable dimensions for Roller Derby	Additional capacity with population growth spread through existing and future school and other indoor facilities.

5.4 CONCLUSIONS – CURRENT AND FUTURE DEMAND

5.4.1 Indoor Sports Courts

Current demand is driven by a shortfall of available facilities to support competition and lack of access to courts for training. In addition there is the pending loss of 3 courts in the Woden Basketball Stadium and the 1 court at CIT Woden which, if the Woden Town Centre is to be a focus for higher density living, is an issue for creating a contemporary urban precinct supported by a range of sport and leisure facilities.

Capital Football has identified a need for a four court facility to support futsal and has developed a business case that supports a plan for operation of the facility and its viability. However the source of capital to develop such a facility is problematic and it is most unlikely that they could self-fund the cost of such a facility. In the interim they have identified a feasible alternative that could see an old 3 court facility (Coorong) at EPIC refurbished for their use and this could allow them to grow futsal in line with the identified demand as well as accommodate other football training needs.

Basketball ACT are planning to expand their facility at Belconnen which could help meet demand from urban growth in Molonglo and West Belconnen in the short term but is unlikely to help on the longer term due to the closure of the facilities in Phillip/ Woden. The expansion of this facility may help address demand from West Belconnen when alternative courts are developed elsewhere (such as Stromlo).

Badminton have identified potential growth and have

a strong following at the university campuses, however their need is for court hours not a dedicated facility. The preference for the sport is also to be on-campus if possible. If more court hours are freed up in school facilities and new facilities are built in growth areas it may be that additional capacity will be available at university campuses. Ideally the planned expansion of courts at University of Canberra would be the best solution for Badminton.

The planned expansion of the facilities at University of Canberra would assist in meeting current and future demand for indoor court sports and as it would not be an asset owned and depreciated by ACT Government, offers a more sustainable solution. However, it should be noted that parking availability and fees may be seen as a constraint for off-campus participants. In addition, there is concern that plans to increase courts at both the University of Canberra and Belconnen Basketball Stadium will target the same catchment and could impact on viability of one or both.

Southern Cross Club had been operating the old indoor facility at Phillip and has advised their lease is expiring and the facility will close. They have not indicated if they are considering establishment of any new facility.

Although all sports identified access to courts for training as a major issue, there is an opportunity to meet a significant portion of this demand via school courts. Transferring more training uses to school courts would also free up existing multi-court facilities to

accommodate more competition hours. However access to all public school courts would be required and the pricing and other barriers that currently operate would need to be addressed. If court hire rates came down to a more market relevant charge, and access simplified through a centralised booking system then school facilities would make a significant contribution to overall provision.

The following options should be considered:

- › Support Capital Football in securing use of the Coorong building at EPIC and in the longer term goal of establishing a permanent 2-4 court indoor football centre.
- › Consider how commercial / club operators could be encouraged to establish a new facility in Phillip with a minimum 2 courts and other elements essential to viability.
- › Retain the current plans for at 3 indoor courts as part of the Stromlo Leisure Centre.
- › Plan for provision of a new 3-4 court facility in Gungahlin as part of an integrated leisure facility. This may be part of a partnership approach with other providers.
- › Implement policy measures that increase use of/ access to all public school courts. This should consider pricing and access structures as well as information and booking systems such as the establishment of a centralised web based booking system.
- › For West Belconnen, consider ensuring that at least 1 school campus has a 2 court facility.
- › Encourage University of Canberra to pursue their plans for the expansion of their facility.

5.4.2 Squash

Future provision for squash is most likely to be focused in Gungahlin and possibly Molonglo. Squash is not a viable standalone facility and contemporary provision options recommend squash courts be provided as part of a multi-use facility (e.g. a sport and wellness centre). Squash have also highlighted that larger more commercially managed “regional” style facilities are likely to be more viable than numerous smaller club facilities.

All existing courts are needed and if the courts at Weston Creek Community Centre are lost then consideration of including squash elsewhere are needed. The proposed expansion of courts at the University of Canberra may be a solution. Alternatively other commercial providers may consider inclusion of courts as part of a new facility. Providing squash courts as part of a community centre is an unusual model and is not the most viable approach to court provision. Longer term sustainability would suggest that these courts would be better provided as part of a multi facility leisure and fitness centre.

It would make sense for any new courts to be located in the growth areas of Molonglo, Gungahlin and West Belconnen where there is no existing provision.

The sport has also expressed concern that heavily used courts at Dickson may be under threat. While the continued provision of courts there is a commercial decision by the facility manager, the location and high use would suggest they are a viable part of the current business. If these courts were lost, then a new commercial provider would be needed who was looking to provide courts as part of another facility.

The following options should be considered:

- › Depending on the future of the courts at Weston Creek Community Centre, consider potential alternative locations for squash courts.
- › Support University of Canberra in their plans to expand their sports centre and encourage them to include additional squash courts. If they provided a total of 8 courts it may reduce the impact of the loss of the Weston courts and reduce need for court provision in Gungahlin.
- › Depending on any expansion of University of Canberra’s sports centre, encourage provision of 6-8 new courts as part of leisure and fitness facility in Gungahlin.

5.4.3 Gymnastics

Provision of gymnastics facilities has tended to be a mix of commercial and club facilities and the sport, traditionally has received little support via publically funded facilities when compared with many field sports. It is however a high participation sport, particularly for girls, and has an expanding base with recent affiliates such as cheer leading and aerobic sports.

Demand analysis modelling suggests that an additional facility is needed by 2030. However from previous work undertaken by Strategic Leisure for the Gymnastics Queensland State Facility Plan, current facility provision and modelling of future needs in the ACT may not be addressing what could be a significant latent demand for this sport – especially given the younger median age of ACT residents and high proportion of families with children. This appears to be reinforced by the sport’s recent facility planning and feedback on utilisation of existing facilities.

Gymnastics advised that the existing facility at Gungahlin is already too small and unable to meet demand. In addition the sport has identified a strong need for a dedicated facility as their “state centre” which can accommodate a strong club as well as elite training and, importantly, is able to conduct events supporting all disciplines.

A number of models for gymnastics facility provision exist. In Brisbane, there has been a very successful partnership with private schools whereby purpose built indoor sport centres have incorporated dedicated, high quality gymnastics training facilities. These schools have a commercial arrangement with a club (typically privately operated) for after-hours use of their facilities which cater for club based training and events. This model is currently in operation at the following schools in Brisbane:

- ▶ Moreton Bay College (<http://www.mbc.qld.edu.au/study-play-a-perform/gymnastics>). Club based at the school is Premier Gymnastics (<http://www.premiergymnastics.com.au>)
- ▶ St Margaret's Anglican Girls School <http://www.stmargarets.qld.edu.au/ExtraCurricular/Sports/Pages/Gymnastics.aspx>). Club based at the school is Delta Gymnastics (<http://www.deltagym.com.au/Brisbane/Venues.aspx>)
- ▶ Clayfield College (<http://www.clayfield.qld.edu.au/>). Club based at the school is Delta Gymnastics (<http://www.deltagym.com.au/Brisbane/Venues.aspx>)

An opportunity also exists for Gymnastics to become an anchor tenant of a multi-use indoor sports centre by utilising an area adjacent to the indoor courts as a dedicated training facility (approx. equivalent to a basketball court). This model provides a regular income stream to the centre and would utilise the indoor courts for major events/ competitions (holding plates for gymnastics apparatus designed into the courts at construction). This model is consistent with the design of leisure facilities as multi-purpose hubs for sport and recreation to maximise viability.

Options to be considered are:

- ▶ Development of a new facility at Gungahlin either co-located with a new indoor sports court facility or in partnership with a school.
- ▶ Consideration of a gymnastics facility co-located with a school campus in Molonglo
- ▶ A new facility at either Gungahlin or Molonglo, if co-located with indoor sports courts, could become the 'state centre' for gymnastics in the ACT
- ▶ Working with Gymnastics to develop a partnership with public or private schools to address needs in areas where other demands exist.

5.4.4 Table Tennis

The existing facility is not viable as a continued venue. An ideal venue would be larger and if able to accommodate more tables and some other uses could be more sustainable. The sport does not have the finances to redevelop the existing facility and if capital is to be repaid it is not clear that a viable financial model could be developed that demonstrates sustainability.

Table tennis, like Badminton has potential for growth with strong appeal amongst international students. More investigation is needed to determine viable options for table tennis.

Options to consider are:

- ▶ Investigate any existing facilities which could be repurposed for table tennis and leased to them.
- ▶ Investigate if there are any new/ existing leisure centres which might be able to accommodate the sport as an anchor tenant.
- ▶ Investigate potential partnerships with a school campus to accommodate table tennis.

5.4.5 Ice Sports

The provision of ice rinks are normally a commercial activity. Current facilities in other states are a mix of stand -alone, commercial as part of a shopping complex, integrated in multi facility developments and other hybrids. The efforts made by the Phillip centre to increase efficiency (e.g. using waste heat to warm the pool) are commendable and the centre is a much valued facility. However it is aging and further investment in the facility seems uncertain.

In some sense there is security the current facility will remain operational, as the territory plan requires that any development on the block provide ice and aquatic facilities. However, if the facility becomes unviable then the owner could close the facility. If the plans for Phillip (Woden Town Centre) as a higher density living area continue then there will be increasing pressure for alternative use of the current block.

The Ice sports have identified that a preferred new facility should be a two rink facility, or at least have a larger rink, which would increase viability through ability to accommodate events as well as increase the activity and program mix possible.

A detailed investigation is required to determine what facility mix would be viable, potential locations and where the commercial/ club investors in any facility may come from. This investigation will need to be driven by the ice sports themselves.

5.4.6 Other Indoor Sports

Provision for other sports such as combat sports and roller sports needs to consider a range of strategies that make access to existing spaces easier and also encourages facilities to be established in a sustainable way. Generally for many of the other indoor sports access to a space as a regular user or tenant is the best solution and there may be surplus building space that can be repurposed or school spaces which would be suitable for a longer term arrangement- providing a cash flow for the school and a home for a sport.

A number of spaces may be suitable for other indoor sports with some minor modification. Funding programs supporting this may assist in increasing use of facilities.

Roller Derby is more problematic due to their spatial needs- however they do not need the height of many courts sports or Gymnastics. Consideration of school facilities for roller derby should be encouraged- Varsity is now paying \$600/ week to Queanbeyan High to be permanent users of the space. It is unfortunate they

could not secure such an arrangement for a school in the ACT as it would appear that would be a reasonable revenue stream for a school.

Canberra Roller Derby has indicated that they would like to establish an independent facility by leasing an industrial or commercial shed. Such initiatives for sports should be encouraged but viability of such ventures is a concern. Considerations for action are:

- ▶ Investigate making school facilities more accessible and supporting schools in finding users. Providing information may be an important part of this and the latest actions by Education and Training Directorate to promote their new policy and provide an on-line data base are a great start.
- ▶ Consider establishing a funding program for minor grants to convert spaces to increase multi-use or enable a new resident sport. The program should be available to all centres, sports clubs and schools.
- ▶ Provide central support contacts for sporting groups seeing a venue.



6 APPENDIX ONE- REVIEW OF PARTICIPATION AND SPORTING TRENDS

6.1 TRENDS INFLUENCING SPORT AND RECREATION PARTICIPATION

Strategic Leisure, through studies undertaken for various local governments and ABS research into the topic, has identified a number of trends that are influencing participation in sport and recreation activities. These include:

6.1.1 General Trends and Observations on Sport and Recreation Participation and Indoor Facilities

The following general trends influencing the use of indoor sport and recreation facilities are evident:

- ▶ Changing patterns of work and declining availability of “uncommitted time” is changing patterns of participation in sport and recreation
- ▶ For many, the leisure experience is one of limited time availability with an expectation of “instant gratification”. This is evidenced by a desire for participants to “turn up and play” where minimal extra commitments are involved. In many cases the participants are willing to pay extra for this service which has created more opportunities for commercial provision.
- ▶ Participation in organised sport is generally static but there is growing demand for social forms of participation in sport and growing demand for adventure and endurance based sport both at completion and participation level.
- ▶ Volunteerism is declining in many sport and recreation organisations. This is placing greater pressure on the remaining volunteer base and may impact on participation levels and/ or costs in future if services that were once provided voluntarily need to be paid for.
- ▶ Availability and/ or cost of insurance have impacted on clubs in recent years.
- ▶ Declining volunteerism is also placing greater pressure on Councils in terms of the way they manage sports facilities on their land.
- ▶ There is an awareness of the importance of “risk management” and the need for a “whole-of-life” approach to facility development and asset management.
- ▶ Programs and facilities are increasingly designed to attract a variety of market segments, are increasingly age specific and are aimed towards:
 - Older adults;
 - Children;
 - Injury recovery;
 - Strength and conditioning;
 - General health, fitness and wellbeing.
- ▶ There is a need for a large proportion of health and fitness floor space retained as multi-use program rooms to accommodate changing market interests as well as a trend towards incorporation of wellness centres and allied health services.
- ▶ Multiple uses of sport and recreation facilities and season overlap are becoming more prevalent, together with the need for new and innovative methods to maximise use of a facility (e.g. community/ cultural events, non-traditional activities).
- ▶ Facility design is trending away from single purpose towards multi-purpose facilities. However there is also an emphasis on ensuring facilities are designed to meet the specific needs of key user groups. There is also a trend towards including social spaces in facility design.
- ▶ There is an increasing trend towards environmentally sustainable design of facilities and use of environmentally sustainable practices, such as water harvesting, synthetic playing surfaces, LED lighting and linkages with sustainable transport solutions.

6.1.2 Megatrends

A recent (2013) CSIRO¹⁴ report identified six megatrends likely to shape the Australian sports sector over the next 30 years. These include:

1. Personalised Sport for Health and Fitness

Individualised sport and fitness activities are on the rise. Australians are becoming more health conscious and increasingly playing sport to get fit, rather than getting fit to play sport. People may be less willing to commit time needed for training and match fixtures in some team sports. Discretionary time available for sport and leisure is limited and the amount of time people spend on sport and outdoor activities has decreased. Consequently they “seek, often serendipitous, opportunities to play or watch sport that fits into a busy schedule.”

Health matters more to Australians than ever before and is likely to feature to a greater extent in people's choices about sport. There has been significant growth in the number of fitness centres (including the rise of 24 hour access gyms) with revenue from the fitness industry estimated at \$2.9billion in 2011-12.

2. The Rise of Lifestyle Sports

While mainstream and organised sports have remained constant or declined over the past decade, lifestyle, adventure and alternative sports have risen in popularity particularly among young people. These sports typically have some element of inherent danger or thrill seeking and participants often a sense of self-expression (eg BMX, skateboarding, kite surfing, white water rafter, scuba diving and rock climbing. Some (eg BMX) have found their way into the Olympics and there are efforts to also have skateboarding and rock climbing included. However opinion is divided among the extreme sports communities about the merit of their inclusion in mainstream competitions due to the nature of lifestyle sports being about constant change and experimentation.

3. Health, Community and Overseas Aid Objectives via Sport

The broader benefits of sport are being recognised by governments and business. With obesity on the rise, one in two Australians being overweight and projected to rise by a further 15% over the next 10 years, and diabetes increasing, sport is seen as having an important role. Participation in sport among children is reported as an effective means of reducing obesity

in adulthood. Many controlled studies demonstrate overwhelming evidence that sport and exercise produce better outcomes in the clinical treatment of mental disorders. Anecdotal evidence of the potential for sport to reduce crime by helping to achieve social inclusion for marginalised groups is also cited.

Despite the physical and mental benefits of sport, there has been a decrease in the prominence of sport and physical activity in the school curriculum and a reduced number of teachers trained in the delivery of sports programs. Sport can build bridges to other countries and contribute to economic and foreign policy objectives.

4. Demographic, Generational and Cultural Change

The population is aging and life expectancy is on the rise. In 1900 males and females had a life expectancy of 50 and 55 years respectively; by 2030 this is projected to be 84.5 and 87.8 years respectively. People may continue to engage in sporting activities further into their old age. The popularity of the World Masters Games suggests that the ageing population is still keen to participate in sporting activities. Increasing cultural diversity will result in different sporting preferences. Sporting organisations will be challenged with capturing the interest of diverse cultures.

Outdoor soccer has had significant growth between 2001 and 2010 with the third highest increase among the top 10 physical activities. Large scale community competitions have become more popular (eg City to Surf fun races, Sydney to the Gong) revealing a demand for sporting activity across broad cross sectoral demographics.

5. Economic Growth and Sports Development in Asia

Population and income growth in Asia has started to raise living standards and available leisure time. The Chinese and Indian economies are likely to play a vital role in shaping the world economy. Asian countries are investing heavily in sports capabilities and the international sporting arena will become increasingly competitive for Australia with the overseas athlete pool growing faster than the Australian athlete pool. The Chinese sports system is channelling the country's sports resources into elite sport. As disposable incomes grow, Asian countries are becoming more interested in sport. This may create new markets for sports television, sports tourism, sports equipment, sports services and sports events.

14 Hajkovicz, S.A., Cook, H., Wilhelmseder, L., Boughen, N. "The Future of Australian Sport: Megatrends shaping the sports sector over the coming decades. A consultancy report for the Australian Sports Commission". CSIRO. Australia

6. Market Pressures and New Business Models

The coming decades are likely to see many Australian sports organisations transition to corporatised governance structures (eg AFL). There will be more pressure on sport from market forces (e.g. virtual participation, smartphone broadcasting, adaptation of game rules to capture emerging markets and offer a better customer experience, move from sport-oriented business to an entertainment business). Elite athletes in some sports will have considerable pay rises which may draw athletes away from sports with lower salaries.

Volunteering in sport and physical recreation organisations accounted for 37% of the total volunteer population in Australia in 2010. But barriers to volunteering are growing (e.g. time pressures, increased bureaucracy, lack of local Council support, lack of appreciation and fear of being sued). The cost of participation is increasing and is a barrier to participation for many people.

6.2 DATA ON PARTICIPATION IN EXERCISE, RECREATION AND SPORT

From 2001 to 2010, data on participation in exercise, recreation and sport was gathered through an annual Exercise, Recreation and Sport Survey (ERASS). Data was collected by telephone and included information about the frequency, nature and type of exercise, sport and recreation activities participated in by persons aged 15 years and over.

In 2011 the Standing Committee on Recreation and Sport ceased the funding and commissioning of the ERASS statistical surveys. The Australian Bureau of Statistics (ABS), in partnership with the new Committee of Australian Sport and Recreation Officials (CASRO) subsequently co-funded the collection of Sport and Physical Recreation data as part of the ABS Multi-Purpose Household Survey (MPHS).

The 2011-12 CASRO report clearly states that:

“Data from the Exercise Recreation and Sport Survey (ERASS) and the MPHS Participation in Sport and Physical Recreation module are not comparable due to methodological differences.”

The sampling methodology, sample sizes, questionnaire design, survey administration and aggregation of data has changed from the previous ERASS model meaning that comparative analysis across years is more difficult and the use of the data for predictive purposes is not as reliable. In addition the reduced sample size has meant the confidence levels have diminished considerably in many results, so they can be viewed as indicative only. It is important to note that while the results indicate a much lower participation rate, this does not mean that people have stopped participating, or participate less, but rather can be attributed to the different research

and analysis methods. Although significant differences are evident in participation rates across the two data sets, many of the participation trends themselves, such as activities most frequently participated in, male and female participation trends, and club-based trends remain consistent.

The following section overviews the most recent CASRO data sets, and detailed tables within this section provide an overview of analysis of figures from the current CASRO data as well as more than 10 years of ERASS sampling.

6.2.1 Participation in Sport and Active Recreation¹⁵

The CASRO report presents the following key findings in relation to participation in sport and active recreation in Australia:

- ▶ An estimated 11.1 million persons aged 15 years and over, or 60% of the population, participated at least once annually in sport and physical recreation. This compares with 65% in 2011-12.
- ▶ The top ten physical activities in 2013-14 were walking for exercise, fitness/ gym, jogging/ running, swimming/ diving, cycling/ BMXing, golf, tennis (indoor and outdoor), soccer (outdoor), basketball (indoor and outdoor), netball (indoor and outdoor).
- ▶ Participation generally decreased in the top 10 activities, except for fitness/gym and basketball, which both experienced minor increases. The activity experiencing the largest decrease in participation was walking for exercise, which decreased 2.4% since 2011-12.
- ▶ Males had a slightly higher participation rate overall, 61.0% compared with 59.4% for females. Participation by males was significantly higher in

15 Australian Bureau of Statistics & Committee for Australian Sport and Recreation Officials, *Participation in Sport and Physical Recreation, Australia 2013-14*, cat. No. 4177.0.

- the 25-34 age bracket (67%) than females (61%).
- ▶ Females were more likely to walk for exercise than males (25% and 14% respectively) and to participate in fitness/ gym (19% and 16% respectively).
 - ▶ Males were more likely than females to play golf (6.6% and 1.4% respectively) or participate in cycling and BMXing (8.5% and 4.0% respectively).
 - ▶ Participation generally decreased with age with 15-17 year olds reporting the highest participation rate (74%) and people 65 years and older reporting the lowest (4.7%).
 - ▶ The participation rate (at least once annually) for organised sport and physical recreation in 2013-

14 was 28%, slightly up from the 2011-12 rate of 27.2%. This includes playing roles (26%) and non-playing roles (7.7%)

Table 10 shows the top 20 sport and physical recreation activities of Australians aged over 15 for 2013-14. As indicated, nine of the top 20 activities can be undertaken indoors.

Data is not yet available by age cohort for the top 20 activities for 2013-14. Table 11 shows this data for 2011-12.

Table 10 Top 20 Sport and Physical Recreation Activities of Australians (15+ years for 2013-14 ABS 2015). Indoor activities highlighted.

Activity	Rank	Total Participation %
Walking for exercise	1	19.2
Fitness / Gym	2	17.4
Jogging / Running	3	7.4
Swimming / Diving		6.4
Cycling / BMXing	5	6.2
Golf		4.0
Tennis (indoor and outdoor)	7	3.0
Soccer (outdoor)		2.4
Basketball (indoor & outdoor)	=9	2.2
Netball (Indoor and outdoor)		2.2
Yoga	11	1.7
Football sports (excluding, rugby, soccer, Australian Rules football)	12	1.6
Bush walking	13	1.5
Dancing / Ballet		1.3
Australian Rules football	=15	1.2
Indoor soccer		1.2
Martial arts	=15	1.2
Outdoor cricket		1.2
Pilates	=19	1.1
Surf sports	=19	1.1

Table 11 Top 20 Sport and Physical Recreation Activities of Australians aged 15 years and older (by Age Cohorts) for 2011-12 (ABS 2012). Indoor activities highlighted.

Activity	Rank	Total Participation	Age Group						
			15-17%	18-24%	25-34%	35-44%	45-54%	55-64%	65 +%
Walking for exercise	1	23.6	6.3*	10.8	16.3	23.5	31.0	36.3	27.5
Fitness/ Gym	2	17.1	9.6	28.9	23.2	18.2	16.2	12.1	8.6
Swimming/ Diving	3	7.8	10.2	6.0	8.2	9.9	7.6	8.6	4.9
Cycling/BMXing	4	7.6	6.4	4.6	9.2	11.7	9.2	7.4	2.3
Jogging/Running	5	7.5	4.9*	11.8	13.4	11.9	5.8	2.7	0.4*
Golf	6	4.8	1.7**	1.8*	3.5	4.3	5.1	6.9	7.5
Tennis (indoor and outdoor)	7	4.2	9.1	3.1	4.8	4.9	4.0	3.6	2.4
Soccer (outdoor)	8	2.7	13.3	5.6	3.6	2.9	1.1	0.1**	0.0
Netball (indoor and outdoor)	9	2.5	8.1	6.0	5.1	1.8	0.7*	np	np
Bush walking	10	2.4	1.0*	1.1**	2.5	2.9	2.7	3.8	1.8
Basketball (indoor and outdoor)	11	2.0	9.2	4.6	3.3	1.3	0.6*	0.2*	0.0
Yoga	12	1.9	0.2**	1.1*	2.8	3.0	1.9	2.0	0.9
Football sports ¹⁶	13	1.8	4.4	5.1	3.3	1.4	0.6*	np	np
Cricket (outdoor)	14	1.6	6.7	2.8	2.4	1.5	0.9*	0.1**	0.2**
Dancing/Ballet	=15	1.4	5.7	1.7*	1.8	0.7	0.5*	1.3	1.3
Fishing	=15	1.4	0.6**	1.0*	0.9	1.3	2.1	1.6	1.4
Lawn bowls	=15	1.4	np	np	0.3**	0.1*	0.9	2.1	4.8
Martial arts	=15	1.4	2.1*	2.3	1.8	1.4	0.7*	1.1	1.0
Australian Rules football	19	1.3	6.5	3.2	2.0	1.3	0.2*	np	np
Surf sports	20	1.3	0.6**	1.6*	1.5	2.3	1.2	0.9	0.2**

* Estimate has a relative standard error of between 25% and 50% and should be used with caution. than 50% and is considered too unreliable for general use.

** Estimate has a relative standard error greater

np Not available for publication but included in totals where applicable, unless otherwise indicated

16 Includes touch football, Oztag, Gaelic football and American football

Table 12: Participation (%) for the top 20 exercise, recreation and sporting activities most frequently participated in by Australians aged 15 years and over (2003-2013/14)

Activity	ABS ¹⁷					ERASS ¹⁸												
	2013/14	2011/12	2010	2009	2008	2007	2006	2005	2004	2003								
	Rate %	Rank	Rate %	Rank	Rate %	Rank	Rate %	Rank	Rate %	Rank								
Walking for exercise (ERASS - Walking other than bushwalking)	19.2	1	23.6	1	35.9	1	36.1	1	39.2	1	33.0	1	37.3	1	39	1	37.9	1
Fitness/ Gym (ERASS - Aerobics/ fitness)	17.4	2	17.1	2	23.5	2	22.9	2	23.5	2	20.2	2	19.2	2	17.1	2	16.0	2
Running/Jogging	7.4	3	7.5	5	10.6	5	11.0	5	9.9	5	7.6	5	7.4	5	8.3	6	7.6	7
Swimming/ Diving (ERASS - Swimming)	6.4	4	7.8	3	13.0	3	14.1	3	14.5	3	12.0	3	13.7	3	16.5	3	15.3	3
Cycling/ BMXing (ERASS - Cycling)	6.2	5	7.6	4	11.9	4	11.1	4	11.6	4	9.7	4	10.2	4	10.5	4	9.4	4
Golf	4.0	6	4.8	6	6.7	6	6.4	=6	7.1	6	5.6	6	6.8	7	7.1	7	7.9	7
Tennis (indoor and outdoor)	3.0	7	4.2	7	6.0	7	6.4	=6	6.8	7	5.8	6	6.9	6	7.8	5	8.4	5
Soccer (outdoor)	2.4	8	2.7	8	4.8	=8	5.1	8	5.2	9	4.2	9	4.2	9	3.8	9	4.2	9
Netball (indoor and outdoor)	2.2	=9	2.5	9	3.7	10	4.0	10	3.9	10	3.2	10	3.6	10	3.6	10	3.6	10
Basketball (indoor and outdoor)	2.2	=9	2.0	11	3.5	=11	3.9	11	3.6	12	3.0	11	-	-	3.5	11	3.2	=12
Yoga	1.7	11	1.9	12	3.5	=11	2.8	=14	3.2	12	2.8	12	3.0	14	3.4	12	3.4	11
Football Sports (ERASS - Touch Football)	1.6	12	1.8	13	2.8	16	2.2	=18	3.2	=14	-	=14	-	-	-	-	-	-
Bushwalking	1.5	13	2.4	10	4.8	=8	5.0	9	6.4	8	5.7	7	4.7	8	5.7	8	5.2	8
Dancing/ Ballet	1.3	14	1.4	=15	2.6	17	2.3	17	2.3	=17	1.8	18	2.4	16	2.2	=17	2.4	16
Cricket (outdoor)	1.2	=15	1.6	14	3.2	14	3.2	12	3.5	13	2.5	13	3.2	12	2.9	14	3.1	13
Australian Football	1.2	=15	1.3	19	3.3	13	2.8	=14	2.9	16	1.9	=15	2.7	15	3.4	=12	2.9	15
Soccer (indoor)	1.2	=15	-	-	-	-	2.2	=18	2.3	=17	1.5	20	1.9	20	-	-	-	-
Martial Arts	1.2	=15	1.4	=15	2.1	=19	-	-	-	-	-	-	-	-	-	-	-	-
Pilates	1.1	=19	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Surf Sports	1.1	=19	1.3	20	-	-	2.5	16	-	-	-	-	-	-	-	-	-	-
Fishing	-	-	1.4	=15	2.2	18	2.2	=18	2.2	=19	1.6	19	2.1	=18	2.1	19	2.3	=17
Lawn Bowls	-	-	1.4	=15	2.1	=19	-	-	-	-	-	-	-	-	-	-	-	-

17 ABS, National Centre for Culture & Recreation, Participation in Sport and Physical Recreation, Australia 2011-12 and 2013-14 Reports.

18 Australian Sports Commission. Participation in Exercise, Recreation and Sport Survey 2010. Annual Report, 2011

6.2.2 Indoor Sport in the ACT

From ABS (CASRO) data¹⁹, the top 20 exercise, recreation and sport activities most frequently participated in by ACT residents aged 15 years and over are as follows. Seven of the top 20 are “Indoor activities” activities as highlighted in the table.

Table 13 Top 20 Activities in ACT

Activity	Rank	Total Participation %
Walking for exercise	1	29.3
Fitness/Gym	2	26.0
Cycling/BMXing	3	15.3
Jogging/Running		11.7
Swimming/Diving	5	8.0
Football sports		5.2
Bush walking	=7	4.7
Soccer (outdoor)		4.7
Golf	9	4.3
Tennis (indoor and outdoor)		3.7
Basketball (indoor and outdoor)	11	3.6
Yoga		3.2*
Netball (indoor and outdoor)	13	3.0*
Martial arts		2.2*
Dancing/ Ballet	15	1.9*
Australian Rules Football		1.7*
Fishing	=16	1.7*
Cricket (outdoor)		1.3*
Lawn Bowls	19	0.5**
Surf sports	20	np

* Estimate has a relative standard error of between 25% and 50% and should be used with caution.

** Estimate has a relative standard error greater than 50% and is considered too unreliable for general use.

np Not available for publication but included in totals where applicable, unless otherwise indicated

19 ABS, National Centre for Culture & Recreation, Participation in Sport and Physical Recreation, Australia 2011-12 Report.

Table 14: Participation rate (%) for the top 20 sport and physical recreation activities most frequently participated in by ACT residents aged 15 years and over (2005-06, 2009-10, 2011-12) from CASRO data)²⁰

Activity	2011/12		2009/10		2005/06	
	Rate (%)	Rank	Rate (%)	Rank	Rate (%)	Rank
Walking for exercise	29.3	1	26.9	1	35.5	1
Fitness/Gym	26.0	2	20.0	2	18.4	2
Cycling/BMXing	15.3	3	11.5	3	11.5	3
Jogging/Running	11.7	4	8.4	4	5.8	6
Swimming/Diving	8.0	5	7.6	5	11.1	4
Football sports	5.2	6	-	-	-	-
Bush walking	4.7	=7	3.0	10	5.4	7
Soccer (outdoor)	4.7	=7	5.5	6	2.6	10
Golf	4.3	9	4.9	8	6.1	5
Tennis (indoor and outdoor)	3.7	10	5.3	7	4.7	8
Basketball (indoor and outdoor)	3.6	11	1.5		0.9	=14
Yoga	3.2*	12	2.0	=12	0.9	=14
Netball (indoor and outdoor)	3.0*	13	3.6	9	2.7	9
Martial arts	2.2*	14	-	-	2.4	11
Dancing/Ballet	1.9*	15	2.2	11	2.1	12
Australian Rules football	1.7*	=16	0.4	15	0.9	=14
Fishing	1.7*	=16	-	-	0.2	19
Cricket (outdoor)	1.3*	18	2.0	=12	1.9	13
Lawn bowls	0.5**	19	0.7	14	0.4	19
Surf sports	^	20	-	-	0.5	17

* Estimate has a relative standard error of between 25% and 50% and should be used with caution

** Estimate has a relative standard error greater than 50% and is considered too unreliable for general use..

np Not available for publication but included in totals where applicable, unless otherwise indicated

²⁰ ABS National Centre for Culture and Recreation, Participation in Sport and Physical Recreation, Australia, 2011-12 Report, 2013.

6.3 CHILDREN'S PARTICIPATION IN LEISURE AND SPORT

This information has been summarised from the Australian Bureau of Statistics 'Children's Participation in Cultural and Leisure Activities' (October 2012) release.

Overall Leisure Participation

From ABS data it is estimated that:

- ▶ 60.2% of children participated in organised sport outside of school hours.
- ▶ 35.2% participated in organised cultural activities (selected) outside of school hours.
- ▶ 71.0% of children attended a cultural venue or event outside of school hours
- ▶ 27.7% did not participate in organised sport or cultural activities.

Trends in Participation

- ▶ Participation in organised sport by children, decreased from 2009 (63%) to 2012 (60%).
- ▶ The participation rate for organised cultural activities increased by 1.5 percentage points from 2009 to 2012.
- ▶ The percentage of participants accessing the internet increased significantly from 79.4% in 2009 to 89.7% in 2012.

Participation in Organised Sport

- ▶ In the 12 months to April 2012, an estimated 1.7 million (60%) children participated in at least one organised sport outside of school hours.
- ▶ Participation in organised sport declined from 2009 (63%) to 2012 (60%).
- ▶ Boys had a higher participation rate in organised sport compared to girls overall (66% compared with 54%) and across all age groups, with the greatest difference being between 9 to 11 year olds (boys 73.3% compared with girls 59.0%).

Participation in Cultural Activities

- ▶ In the 12 months to April 2012, an estimated 980,000 (35.2%) children participated in organised cultural activities and 1.9 million (71%) attended a cultural venue or event.
- ▶ Playing a musical instrument (17.6%) and Dancing (15.0%) were the most popular organised cultural activities.
- ▶ Participation in organised cultural activities increased slightly from 2009 (33.7%) to 2012 (35.2%).
- ▶ Girls had a significantly higher participation rate in organised cultural activities to boys (44.9%) compared with 23.0%).

Most Popular Sport & Recreation Activities

- ▶ Overall, the most popular organised sport activities were Swimming and Diving (17.7%) and Soccer (outdoor) (14.3%).
- ▶ The most popular organised sport activities for boys were Soccer (outdoor) (21.7%), Swimming and Diving (16.5%) and Australian Rules football (14.9%).
- ▶ The most popular organised sport activities for girls were Swimming and Diving (18.9%), Netball (16.2%) and Gymnastics (8.1%).
- ▶ Of the other selected recreational activities, the most popular was Watching TV, DVD's or videos (95.8%), Other screen-based activities (85.4%) and Homework or study (81.4%).
- ▶ Skateboarding, rollerblading or riding a scooter (53.8%) and Bike riding (63.5%) were moderately popular, with more males than females participating.



Table 15: Participation rate (%) for the top 12 selected organised sports most frequently participated in by children aged 5 to 14 years (2000, 2003, 2006, 2009, 2012)²¹

Activity	2012		2009		2006		2003		2000	
	Rate %	Rank	Rate %	Rank	Rate (%)	Rank	Rate (%)	Rank	Rate (%)	Rank
Swimming	17.1	1	18.5	1	17.4	1	16.6	1	14.4	1
Soccer (outdoor)	14.3	2	13.2	2	13.2	2	13.4	2	11.4	2
Australian Rules Football	8.1	3	8.6	3	7.5	4	7.3	6	6.6	6
Netball	8.0	4	8.4	4	8.5	3	9.1	3	9.1	3
Basketball	7.9	5	7.4	6	6.6	6	7.7	5	7.6	5
Tennis	7.4	6	7.9	5	7.3	5	8.6	4	8.5	4
Martial Arts	5.8	7	5.7	7	4.5	8	4.9	8	4.0	8
Gymnastics	4.8	8	4.6	9	3.5	10	3.5	10	0.9	11
Cricket (outdoor)	4.7	9	5.2	8	5.4	7	5.0	7	5.3	7
Rugby League	3.9	10	3.6	10	4.2	9	2.9	11	3.6	10
Athletics/track & field	3.2	11	3.3	11	2.9	11	3.8	9	3.9	9
Rugby Union	2.1	12	-	-	-	-	-	-	-	-

Table 16: Gender breakdown of participation rates in the top 10 organised sports most frequently participated in by Children aged 5 to 14 years (2012)

Activity	FEMALES Participation Rate (%) & Rank		Activity	MALES Participation Rate (%) & Rank	
	2012			2012	
	Rate %	Rank		Rate %	Rank
Swimming	18.9	1	Soccer (outdoor)	21.7	1
Netball	16.2	2	Swimming	16.5	2
Gymnastics	8.1	3	Australian Rules Football	14.9	3
Basketball	6.6	4	Basketball	9.2	4
Soccer (outdoor)	6.5	5	Cricket (outdoor)	8.6	5
Tennis	6.6	6	Tennis	8.4	6
Martial Arts	3.7	7	Martial Arts	7.8	7
Athletics/track and field	3.1	8	Rugby League	7.5	8
Hockey	2.0	9	Rugby Union	4.0	9
Touch Football	1.6	10	Athletics/ track & field	3.2	10

21 ABS. *Children's Participation in Cultural and Leisure Activities, 2009, 2012.*

22 ABS. *Children's Participation in Cultural and Leisure Activities, October 2012.*

7 APPENDIX TWO - DETAILED INVENTORY

FACILITY NAME	FACILITY TYPE	OWNERSHIP	SUBURB	ADDRESS	INVENTORY	EXTERNAL USE ALLOW
Please Note: This inventory is based on information available at time of collation and may contain some errors . Further updates are planned.					IC- indoor court, G-gymnastics, S-squash, O-other, T-tennis	
ACT Netball Centre	Indoor court sport	Club- Non Profit	LYNEHAM	435 NORTHBOURNE AVENUE	G	Yes
Active Leisure Centre	Indoor court sport	ACT - Other	WANNIASSA	115 MCBRYDE CRESCENT	1 IC, 4 T, 5 S	Yes
Belconnen Basketball Centre	Indoor court sport	ACT-Sport and Rec	BELCONNEN	42 OATLEY COURT	4 IC	Yes
Belconnen Community Centre	Indoor court sport	ACT - Other	BELCONNEN	23 SWANSON COURT, 26 CHANDLER STREET	1 IC	Yes
Canberra Institute of Technology, Reid	Indoor court sport	ACT - Other	REID	CONSTITUTION AVENUE	1 IC, 2 S	Yes
Canberra Institute of Technology, Woden	Indoor court sport	ACT- Other	PHILLIP	AINSWORTH STREET	1 IC	Yes
Indoor Sports Kambah	Indoor court sport	Private/commercial	KAMBAH	JENKE CIRCUIT	2 IC	Yes
Kaleen Indoor Sports Centre	Indoor court sport	Private/commercial	KALEEN	16 GEORGINA CRESCENT	2 IC	Yes
Lyneham Hockey Centre	Indoor court sport	Club- Non Profit	LYNEHAM	4 RIGGALL PLACE, 196 MOUAT STREET	2 IC	yes
Southern Cross Stadium Tuggeranong	Indoor court sport	Club- Non Profit	GREENWAY	7 PITMAN STREET	5 IC	Yes
Tuggeranong Indoor Multi-Use Facility	Indoor court sport	ACT - Other	GREENWAY	299 SOWARD WAY	2 O	Yes
University Of Canberra	Indoor court sport	University	BRUCE	20 TELITA STREET, 11 KIRINARI STREET, UNIVERSITY DRIVE	2 IC, 4 S	Yes
Weston Indoor Sports	Indoor court sport	Private/commercial	WESTON	45 LIARDET STREET	3 IC	yes
Woden Basketball Centre	Indoor court sport	Club- Non Profit	PHILLIP	13 IRVING STREET	3 IC	Yes
Canberra City Gymnastics	Gymnastics	Private/commercial	BELCONNEN	85 CHANDLER STREET	1G	Yes
Grant Cameron Community Centre	Gymnastics	ACT - Other	HOLDER	27 MULLEY STREET, 25 MULLEY STREET	1 G	No
Gungahlin Gymnastics	Gymnastics	Private/commercial	MITCHELL	4 DARCE STREET	1G	club
Southern Canberra Gymnastics Club	Gymnastics	Club- Non Profit	ERINDALE	25 GARTSIDE STREET	1 G	club
ACT Table Tennis Centre	Table Tennis	Club- Non Profit	GRIFFITH	CANBERRA AVENUE	2 S, 5 O	Yes
Canberra Tennis Centre (Next Gen Fitness)	Tennis	Club- Non Profit	LYNEHAM	3 RIGGALL PLACE	4 T, 6 S	Yes / Squash is club only
Phillip Swimming And Ice Skating Centre	Ice	Private/commercial	PHILLIP	1-5 IRVING STREET	1 O	Yes
Weston Creek Community Centre	Squash	ACT - Other	WESTON	12 WHITNEY PLACE	4 S	Yes
Woden Squash Centre	Squash	Club- Non Profit	PHILLIP	4 LAUNCESTON STREET	8 S	Yes
Brindabella Christian College	Independent school	Private/Commercial	LYNEHAM	136 BRIGALOW STREET		No
Burgmann Anglican School	Independent school	Private/Commercial	GUNGAHLIN	CRN GUNGAHLIN AVENUE & THE VALLEY AVENUE	1 IC	Sometimes
Canberra Christian School	Independent school	Private/Commercial	MAWSON	64 AINSWORTH STREET	1 IC	Yes
Canberra Girls Grammar School	Independent school	Private/Commercial	DEAKIN	48 MELBOURNE AVENUE, 2 GAWLER CRESCENT	1 IC	Yes
Canberra Montessori School	Independent school	Private/Commercial	HOLDER	35 MULLEY STREET		Unsure
Daramalan College	Independent school	Private/Commercial	DICKSON	121 COWPER STREET, 47 MORPHETT STREET	2 IC	No
Emmaus Christian School	Independent school	Private/Commercial	DICKSON	73 DAVENPORT STREET	1 IC	Yes
Marist College Canberra	Independent school	Private/Commercial	PEARCE	27 MARR STREET	2 IC	No
Merici College	Independent school	Private/Commercial	BRADDON	44 IPIMA STREET	2 IC	Yes
Radford College	Independent school	Private/Commercial	BRUCE	1 COLLEGE STREET	2 IC	Yes
St Clares College	Independent school	Private/Commercial	GRIFFITH	7 MCMILLAN CRESCENT	1 IC	No

St Edmund's College Canberra	Independent school	Private/Commercial	GRIFFITH	110 CANBERRA AVENUE	2 IC, 2 S	Yes
St Francis Xavier College	Independent school	Private/Commercial	FLOREY	12 BARNARD CIRCUIT	1 IC	Limited
St John Paul II College	Independent school	Private/Commercial	NICHOLLS	1021 GUNGAHLIN DRIVE	1 IC	Yes
St Mary MacKillop College	Independent school	Private/Commercial	WANNIASSA	MACKINNON STREET		Unsure
Trinity Christian School	Independent school	Private/Commercial	WANNIASSA	34 MCBRYDE CRESCENT	1 IC	Yes
Ainslie Primary School	Public school	Government	AINSLIE	DONALDSON STREET	1 IC	Unsure
Alfred Deakin High School	Public school	Government	DEAKIN	111 DENISON STREET	1 IC	Yes
Amaroo Senior Site and Primary School	Public school	Government	AMAROO	KATHERINE STREET	1 IC	unsure
Aranda Primary School	Public school	Government	ARANDA	BANAMBILA STREET		Unsure
Belconnen High School	Public school	Government	HAWKER	111 MURRANJI STREET		Yes
Calwell High School	Public school	Government	CALWELL	111 CASEY CRESCENT		Yes
Campbell High School	Public school	Government	CAMPBELL	15 TRELOAR CRESCENT		Yes
Canberra College	Public school	Government	PHILLIP	40 LAUNCESTON STREET	1 IC	Yes
Canberra High School	Public school	Government	MACQUAIRE	BINDUBI STREET	2 IC	No
Caroline Chisholm School	Public school	Government	CHISHOLM	108 HAMBIDGE CRESENT	1 IC	Unsure
Chapman Primary School	Public school	Government	CHAPMAN	PERRY DRIVE	1 IC	Unsure
Charles Conder Primary School	Public school	Government	CONDER	TOM ROBERTS AVENUE	1 IC	Unsure
Dickson College	Public school	Government	DICKSON	184 PHILLIP AVENUE	1 IC	Yes
Gungahlin College	Public school	Government	GUNGAHLIN	23 GOZZARD STREET	1 IC	Yes
Harrison School	Public school	Government	HARRISON	20 WIMMERA STREET	2 IC	Yes
Hawker College	Public school	Government	HAWKER	51 MURRANJI STREET	1 IC	Yes
Kaleen High School	Public school	Government	KALEEN	104 BALDWIN DRIVE	2 IC	Yes
Kingsford Smith School	Public school	Government	HOLT	100 STARKE STREET	1 IC	Unsure
Lake Ginninderra College	Public school	Government	BELCONNEN	2 EMU BANK	1 IC	Yes
Lake Tuggeranong College	Public school	Government	TUGGERANONG	123 COWLISHAW STREET, 145 COWLISHAW STREET	1 IC	No
Lanyon High School	Public school	Government	CONDER	HEIDELBERG STREET	1 IC	Yes
Lyneham High School	Public school	Government	LYNEHAM	61 GOODWIN STREET	1 IC	Yes
Melba Copland Secondary School	Public school	Government	MELBA	CONLEY DRIVE	1 IC	Unsure
Melrose High School	Public school	Government	PEARCE	41 MARR STREET	1 IC	Yes
Narrabundah College	Public school	Government	NARRABUNDAH	20 JERRABOMBERRA AVENUE	1 IC	No
Palmerston District Primary School	Public school	Government	PALMERSTON	KOSCIUSZKO STREET	1 IC	Unsure
Stromlo High School	Public school	Government	WARAMANGA	95-97 NAMATJIRA DRIVE	1 IC	Yes
Wanniassa School - Junior Campus	Public school	Government	WANNIASSA	WHEELER CRESENT	1 IC	Unsure
Wanniassa School - Senior Campus	Public school	Government	WANNIASSA	STERNBERG CRESENT	1 IC	Yes
ANU Sports Centre	University	University	ACTON	BARRY DRIVE, CLUNIES ROSS STREET	4 IC, 2 S	Yes
Australian Institute Of Sports	Other	ACT-Sport and Rec	BRUCE	26 LEVERRIER STREET, 30 BATTYE STREET	7 IC, 1 O, + arena, 1G	Yes
Mpower Dome	Other	Private/commercial	CHISHOLM	56 COYNE STREET	8 T	Yes
Team Fitness Centre	Other	Private/Commercial	DICKSON	2 DICKSON PLACE	6 S	Yes

