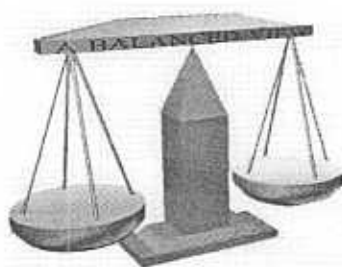


AQUATIC FACILITIES ASSESSMENT

**City of Joondalup
Leisure Centres – Craigie**

FINAL DRAFT REPORT



**A Balanced View (ABV)
Leisure Consultancy Services**

FEBRUARY 2007



**A Balanced View (ABV)
Leisure Consultancy Services**

EXECUTIVE SUMMARY

The Craigie Leisure Centre (CLC) has had a very successful reopening of its aquatic facilities after a \$10.1 million redevelopment was opened in July 2006. Attendances at the centre have since outperformed all expected performance indicators.

This situation has led the City of Joondalup to assess the need for additional aquatic facilities at the Craigie Leisure Centre with specific consideration given to a 50m pool after this feature was planned as a potential future stage of the centre in the recent redevelopment.

Environmental scan

It is interesting to note when viewing the Perth metropolitan area that between Joondalup Arena and Bold Park, Beatty Park, Terry Tyzack facilities, exists the largest area where a "gap" (in terms of comparative provision) in large aquatic centres and specifically 50m pools exists (a 23 km stretch north to south).

There is no recommended provision level of 50m pools within the Perth metropolitan area and the Department of Sport and Recreation staff in WA have provided feedback that they believe adequate provision of such facilities exists currently (generally within Perth metropolitan area).

A list of competitors of CLC in the table below highlights the competitors by type.

Craigie Leisure Centre Competitors	Distance (km)
Local Government Facilities	
Aquamotion Wanneroo	6
Balga Aquatic Centre	9
Terry Tyzack Aquatic Centre	15
Bold Park Aquatic Centre	15
Beatty Park Aquatic Centre	17
Arena Joondalup (State Government)	7
Challenge Stadium (State Government)	17
LTS Facilities (Commercial)	
Whitford City State Swim	2
Carine Glades Swim & Health	6
Zest Health Club - Joondalup	6
Zest Health Club - Madeley	5
Fitness First Balga	7
School Facilities	
Warwick SHS	6
Carine SHS	6
Greenwood SHS	4
Balcatta SHS	10
St Mary's Anglican Girls School	9



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In general terms Craigie Leisure Centre enjoys one of the largest catchment areas with limited aquatic facility competition in the metropolitan area. A regional review shows that a large area south of the CLC is void of aquatic leisure facilities. This area is bounded by Balga Aquatic Centre (redeveloped facility under construction), Bold Park (outdoor only) Terry Tyzack Aquatic Centre, and Challenge Stadium. The spatial distribution of competitors can be seen in Appendix 1 - CLC Catchment Map.

Craigie Leisure Centre is situated at the northern end of this area and therefore is able to draw the market directly south almost exclusively in its primary catchment zone (5-8kms). The major competitor outlined in the review is the Arena Joondalup due primarily to its close proximity, similar range of facilities, programs and services.

Other general aquatic competition is provided by other Local Government Leisure Centres; Aquamotion 6kms to the east, and the soon to be re-commissioned Balga Aquatic Centre 9km to the south east.

A number of proposed aquatic facilities are planned within the extended catchment of the CLC;

- Mindarie 50m pool (DSR funded 50m pool currently the subject of an Expression of Interest procedure)
- Coastal pool for the City of Stirling is a planned aquatic facility which will be located west of the freeway and is subject to a needs and feasibility study
- Balga Aquatic Centre (City of Stirling) redevelopment which is an upgrade of the existing centre and is currently underway and will provide indoor aquatic facilities
- Aquamotion redevelopment (City of Wanneroo), a \$13 million project that will begin in July 2007 and incorporate extended indoor aquatic facilities and an outdoor water playground area amongst other features.

Assessment of Need

Demand for aquatic facilities would not be expected to increase due to the projected population growth of the City of Joondalup alone over the next 15 years.

New land developments projected to increase population within the City of Wanneroo are expected to typically attract more families with young children. Whilst the City of Wanneroo is redeveloping Aquamotion (in the southern end of the City), population growth is planned for the northern areas. If considerable population growth places pressure on the Aquamotion centre, it may result in population living to the west of that centre choosing to utilise CLC in the future.

All key stakeholders were consulted during the course of this study and the key findings were as follows;



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- 29 Public submissions were made supporting the need for an 8-10 lane 50m pool, due to the current facility being inadequate for their needs, overcrowding and insufficient access to a 50m pool within the City of Joondalup.
- The random community survey found that;
 - 25% of respondents reported that facilities are not always available for use when they require them.
 - 52% believe that further aquatic facilities should be provided at CLC, with 70% requesting a 50m pool (slightly more requesting indoors 52%), 37% requesting water slides and 33% water playground facilities (mostly required indoor).
 - If a 50m pool was available 78% reported they would increase their current levels of usage by 2-3 times per week (32%) and at least once per week (28%).
 - A reasonably high level of support for a 50m facility is evidenced by the fact that 33% of ratepayers surveyed would be prepared to pay \$1-49 extra in their rates per annum for the provision of a 50m pool.
 - 92% of respondents were prepared to pay up to 5% extra in admission fees if the facilities they desired were provided, indicating a serious level of desire for further facility provision at CLC.
- The random user survey found that;
 - 46% reported that facilities are not always available for use when required with 26% reporting that it has prevented them from using the facilities. This is further supported by 18% reporting specifically that they were very or slightly unsatisfied that 25m lane availability.
 - A high level of support for further facilities was reported with 63% supporting further facilities added to CLC.
 - A 50m pool was well supported with almost 90% of those supporting extra facility provision, whilst 41% suggested waterslides and 40% a water playground.
 - The support for the above facilities was established with 50% of the respondents who were ratepayers (70%) prepared to pay \$1-49 extra rates and 85% of respondents prepared to pay up to 5% higher admission fees (45% reported 5-10% higher fees) if their suggested facilities were provided.
- The Schools survey found that;
 - 6 schools reported that they required further facilities at CLC, with 4 specifically requesting a 50m pool for swim training and carnivals.
 - 50% of responding schools reported facilities as the main reason for not intending to use CLC within the next 12 months.



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- If the CLC provided the desired facilities, 67% of those schools responding reported that they would increase use of CLC (averaging 40% increase in use) with a similar percentage reporting the likely transfer of existing use from other facilities.
- The Staff workshop found that;
 - Children particularly aged between 5 and 12 years of age have very little interest at CLC.
 - The 25m pool and leisure pools are very congested at peak demand times and extra capacity is required to accommodate users at these times.
 - Further aquatic provision should have a relatively flat floor for programming needs.
- Existing User Groups of the Centre report;
 - Most are unsatisfied with facility availability.
 - Most (60%) request specifically a 50m pool, and that they would increase use from 1 – 4 times per week if provided.
 - Physiotherapy groups (2) report a need for further warm water indoor pool space with greater area of deeper water (1.5m).
 - The Department of Education and Training (major facility user with over 59,000 attendances per annum) report that the facilities are overcrowded for their needs
- The State Sporting Associations generally support a 50m pool being developed to their individual sports specification needs.

Facility Development Options

Based on the consultation with key stakeholders, a desire for 2 predominant types of aquatic facilities have been expressed; a 50 metre pool and children's aquatic play facilities (including water slides). Random community consultation indicates that over 36% of the total City of Joondalup community support a 50m pool addition to CLC and approximately 20% support an aquatic playground and slides.

The provision of these facilities is supported by the very high patronage numbers experienced within the centre since its reopening. The demand at peak times for the various markets has led to a reduced quality of experience for users due to overcrowding and a reduced availability of facilities at the desired times by users. The provision of these facilities would serve to alleviate this peak demand and attract potential increased usage from current users with the potential to also attract new users to CLC.



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Operational Impact

The following is an approximate projected operating budget for CLC with an outdoor 50m pool and water playground added to the current mix of facilities. (Please note these projections are based on extending current operating performance for CLC Year to date which signifies their approximate nature).

CLC Estimated Operating Budget Impact New Aquatic Facilities			
	Attendances	\$ income	\$ Expenditure
50m Pool			
Income			
General attendances	28,000	\$92,120	
Schools - carnivals	6,000	\$9,000	
Schools - attendances	1,500	\$3,800	
Aqua group fitness	9,000	\$20,900	
Secondary income		\$1,780	
TOTAL	38,500	\$127,600	
Expenditure			
Utilities			\$10,000
Water			\$25,000
Lifeguards			\$126,800
Aqua instructors			\$8,200
Superannuation			\$11,205
TOTAL			\$170,705
Water Playground			
Income			
General Attendances	17,000	\$66,640	
Secondary income		\$680	
TOTAL		\$67,320	
Expenditure			
Utilities			\$3,000
Lifeguards			\$2,700
Superannuation			\$243
TOTAL			\$5,943
Combined Totals		\$194,920	\$176,648
NET Surplus / Deficit			18,272



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The addition of the new facilities is likely to have a neutral effect on existing budget performance. This position is enhanced greatly by the ability to utilise Geo thermal heating which is broadly estimated to save \$100,000 p.a. for the equivalent water body if heated by gas boiler system.

Recommendations

That the City of Joondalup;

1. Receive the Aquatic Facilities Assessment, City of Joondalup Leisure Centres Craigie, Report.
2. A need for further aquatic facilities currently exists at the Craigie Leisure Centre; the facilities that should be considered for provision are an outdoor 50 metre pool designed for maximum flexibility of use and an outdoor zero depth water playground facility.
3. A detailed feasibility study be conducted to determine the potential facility specifications with accurate cost estimates and projected operational budget.



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INTRODUCTION

The City of Joondalup engaged A Balanced View Leisure Consultancy Services to conduct the "Aquatic facilities Assessment – City of Joondalup Leisure Centres – Craigie" study.

This study has been underpinned by a broad consultative process that has enabled the community to express views and needs with regards to future aquatic facility provision at Craigie Leisure Centre. The needs of the major stakeholders including current users and the wider City of Joondalup community have been sought and reviewed to ensure responsible future planning of potential aquatic facilities.

PROJECT BACKGROUND

The Craigie Leisure Centre (CLC) has had a very successful reopening of its aquatic facilities after a \$10.1 million redevelopment was opened in July 2006. Attendances at the centre have since outperformed all expected performance indicators.

This situation has led the City of Joondalup to assess the need for additional aquatic facilities at the Craigie Leisure Centre with specific consideration given to a 50m pool after this feature was planned as a potential future stage of the centre in the recent redevelopment.



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METHODOLOGY

The following methodology was utilised for this study.

Report Area	Key Tasks / Notes
Literature review	<ul style="list-style-type: none">Reviewed all relevant existing reports, and documents, including previous related studies and current operating results.Undertook relevant research on aquatic facility trends.
Environmental scan	<ul style="list-style-type: none">Determined potential 50m pool catchment for CLC.Demographic, social and economic review of the catchment area versus Joondalup versus Perth to identify any specific characteristics of the community to consider.Analysed past, current and future population trendsIdentified facilities within Joondalup & neighbouring LGA's – public & private leisure and aquatic facilities that may impact on operations of CLC developments.Undertook detailed competitor analysis including site audit and collated key operating data of these facilities where possible, commenting on positioning and key markets.Produce a map depicting the centres within a 10km radius.
Industry trends	<ul style="list-style-type: none">Consulted with industry leaders (architects, DSR WA, NSW & Vic, Centre Managers, Private Leisure facility operators) for current and future trend identification in aquatic facility provision and participation.Identified similar facilities to those proposed within this study and analyse areas of business & utilisation patterns that provide relevant examples to show potential outcomes of redevelopment.Researched industry for benchmark data including CERM.
Consultation	<ul style="list-style-type: none">Consultation included, Council, Key Stakeholders, Joondalup Community (Users and Non-users), neighbouring LGA's & Department of Sport and Recreation.Identified key stakeholders and determined their needs through consultationPrioritised stakeholder needs.
Capital Cost Estimates	<ul style="list-style-type: none">Provided broad cost estimates for each facility feature identified within research.
Operational Cost Estimates	<ul style="list-style-type: none">Based on the findings of the research, provided estimates for utilisation with related operating income and expenditure.Where possible provision of comparative operating data for recommended facility features was used for benchmarking estimates.
Facility Justification	<ul style="list-style-type: none">Recommended future aquatic facility requirements for CLC based on needs expressed within the research and justifiable on a triple bottom line basis and within the next 5 years.Identified funding options and opportunities for the City of Joondalup consideration.
Report	<ul style="list-style-type: none">Provide Draft Report for feedback (electronic and hard copy)Provide Final Report (electronic and hard copy)



LITERATURE REVIEW

The following documents were read as background to this study;

- **City of Joondalup Community Strategic Plan 2003 – 2008, *City of Joondalup 2003*.**

Provides strategic direction via an integrated planning framework for the City. The Key Focus Area of Community Wellbeing states a relevant objective for this report as "provide leisure and recreational activities aligned to community expectations incorporating innovative opportunities for today's environment".

- **City of Joondalup Community Development Strategy 2006 – 2011, *City of Joondalup, 2006*.**

Details key direction for the next 5 years for Community Development within the City of Joondalup.

Relevant findings / direction for this study are the following;

- Identified need for the City to cater for families with children in terms of providing play opportunities programs and resources.
- Develop new programs and services to increase participation at leisure centres (within the leisure plan for leisure centres).

- **Participation Trends in Physical Activity - NMRRAC 2006.**

Details trends in national, state and local physical activity with potential strategies for NMRRAC members to increase unstructured physical activity.

- **Facility Census NMRRAC 2005**

Details the list of LGA provision of aquatic facilities within the NMRRAC region.

- **City of Joondalup Council Minutes – 28th July 2005, *Petitions for 50m pool*.**

**PETITION REQUESTING PROVISION OF A 50 METRE, 8 LANE
OUTDOOR POOL AT CRAIGIE LEISURE CENTRE – [09050] [14528]**

A 144-signature petition was received on behalf of the Association of Independent Retirees (A.I.R.) Limited requesting the City of Joondalup make provision for a 50 metre, 8 lane outdoor pool at the Craigie Leisure Centre in the City's financial budget for 2005/2006.



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PETITION REQUESTING PROVISION OF A 50 METRE, 8 LANE
OUTDOOR POOL AT CRAIGIE LEISURE CENTRE – [090501] [14528]

A 125-signature petition was tabled at the Council meeting on behalf of residents of the City of Joondalup requesting the City of Joondalup make provision for a 50 metre, 8 lane outdoor pool at the Craigie Leisure Centre in the City's financial budget for 2005/2006.

Both petitions were received and referred to the respective business Unit.

▪ **SD4 – Strategic Directions 2006 – 2010, WA Sport and Recreation 2006.**

This document has been developed to provide vision and direction for the sport and recreation industry in WA. Relevant challenges identified in the document include; the need for organizations to broaden their revenue streams; the need to respond to the impacts of climate change; the need to implement best practice strategies; and the need to provide greater opportunities for disadvantaged groups.

Relevant Key focus areas of SD4 include;

- Organizational development - with the desired outcome to develop organisations that provide sport and recreation services that are effective, accountable, viable and responsive to their stakeholders; and
- Participation – with the desired outcome to develop a more physically active society in which sport and recreation maintains and increases its contribution to community wellbeing.



ENVIRONMENTAL SCAN

It is important to note the operating environment that the Craigie Leisure Centre currently operates within to better understand the need for further aquatic facilities.

POPULATION CATCHMENT

The Craigie Leisure Centre (CLC) Operating Catchment Map (see Appendix 1), depicts the physical positioning of CLC with a 10km radius highlighted. This map highlights that the 10km radius almost perfectly represents the entire City of Joondalup population.

Determining a catchment area for a Leisure centre is a difficult exercise, due to the large number of variations that impact on such;

- Facility features and scale of facility
- Physical and psychological barriers
- Programming level, unique characteristics and availability
- Pricing
- Level of competition
- Demographic characteristics (disposable income, age etc)

A 5 – 8 km catchment radius has a high level of general acceptance within the leisure industry for a large multi purpose leisure centre. The figure of 5km radius is used as the “primary catchment” for Centre for Environmental and Recreation Management (CERM) benchmarking purposes.

The population catchment area is considered to be relatively dense when it is considered that approximately 160,000 people live within the 10km catchment area. ABV research shows that “successful” large Leisure centres have more than 70,000 people within their 5km catchment area.

A general acceptance of a 50m pool possessing a larger catchment area than a regular leisure facility with 25m pools is prevalent within the leisure industry. No documented evidence of such is available however (primarily due to attendance data not being kept to differentiate between use of 25m and 50m bodies of water). This larger catchment is most probably due to the fact that 50m pools are far less prevalent than 25m pools, therefore users specifically requiring to use a 50m pool are typically forced to travel further.

A 50m pool is also typically utilised (WA and Australia) by people with sporting competition needs such as swim clubs and water polo players which have specific 50m pool facility use associated with their competition. This then translates to a need or desire to train in similar facilities as the competition facilities. In order to satisfy this need participants will generally travel further distances to specific facilities.



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Determining a catchment area for a specialist 50m pool facility is then influenced by the location of all 50m pools with similar features. Appendix 1. shows that other public 50m pools are currently located to the north at Joondalup Arena (7kms), to the south west at Challenge Stadium (a State level facility) 18kms, Bold Park 15kms, directly south at Beatty Park Leisure Centre 17kms, the south east at Terry Tyack Aquatic Centre 15kms. The Balga Aquatic Centre (9kms) formerly had a 51m outdoor pool to the east of CLC but is being redeveloped and will not offer such a facility.

Based on a 10km catchment area of a 50 metre pool, a catchment for the Joondalup Arena would stretch approximately 3kms south of CLC. In a very rough calculation this would account for approximately 65% of the City of Joondalup. The area from 3kms south of CLC is not well serviced by a 50m pool 10km catchment as evidenced by the distances of other pools from CLC above.

There is no recommended provision level of 50m pools within the Perth metropolitan area and the Department of Sport and Recreation staff in WA have provided feedback that they believe adequate provision of such facilities exists currently (generally within Perth metropolitan area).

It is interesting to note when viewing the Perth metropolitan area that the area between Joondalup Arena and Bold Park, Beatty Park, Terry Tyack facilities is the largest area where a "gap" (in terms of comparative provision) in 50m pools exists (a 23 km stretch north to south).



DEMOGRAPHIC ANALYSIS

When comparing Joondalup as a Local Authority area with Perth in general, the following key comparisons can be made;

Category	Joondalup	Perth
Median Age (2004-05)	36.4	36.1
Median household income per week	\$1000-1099	\$800-999
Household income less than \$500 per week	17.7%	27.4%
Median household size	2.9	2.6
Born overseas	38%	31.2%

Source: Population by Age and Sex, Western Australia (ABS – Jun 2005)
Community Profile, Perth Statistical Division (ABS – 2001)
Community Profile, Joondalup LGA (ABS – 2001)
Note: Totals do not include overseas visitors

- The average age is slightly older in Joondalup than the Perth average.
- Median household income is significantly higher than the Perth average.
- The percentage of Joondalup households with total income less than \$500 per week is almost 10% lower than the Perth average.
- Median household size in Joondalup is the same as the Perth average.
- The percentage of people in Joondalup born overseas is 6.8% higher than the Perth average.

An implication from these statistics is that Joondalup residents are more affluent than average Perth population which requires consideration for price setting. Joondalup also has a greater proportion of people born overseas compared to the Perth average so therefore considerations to cultural differences must be acknowledged and incorporated in programming.

AGE	0-14	15-19	20-24	25-39	40-54	55-64	65+
JOONDALUP	22.5%	9.4%	6.6%	19.4%	26%	7.9%	5.4%
TOTAL PERTH REGION	20.5%	7.7%	7.1%	21.9%	21.7%	8.8%	11.2%

Source: Community Profile, Perth Statistical Division (ABS 2001) Community Profile, Joondalup LGA (ABS 2001)

- Joondalup has an almost 2% larger percentage of its residents in the younger age categories of 0-14 and 15 - 19.
- Joondalup has a higher percentage of people in the 40 – 54 age category than the Perth average by 4.3%.
- Joondalup has almost half the amount of people 65+ as the Perth average.

An implication from these statistics is that facilities in a redeveloped aquatic centre should consider the needs of families (young people and the 40 – 54 age groups) as a priority.



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FAMILY TYPE	One Parent Families	Couple/ Family Without Children	Couple / Family With Children	Other Family Types
JOONDALUP	12.6%	30.7%	55.6%	1.1%
TOTAL PERTH REGION	15.5%	35.2%	47.3%	2.0%

Source: 2001 Census of Population and Housing (ABS - 2001)

- There is a lower percentage of one parent families in Joondalup than the Perth average; 1.9% lower.
- There is lower percentage of Couple / Family without children in Joondalup than for the Perth average; 3.3% lower.
- There is significantly higher percentage of Couple / Family with children in Joondalup than for the Perth average; 8.3% higher.

An Implication from these statistics is that it is further evidence that families with children (traditional family structures) in Joondalup require significant attention with regards to facility provision and pricing / programming consideration.

MOTOR VEHICLES	0	1	2	3+	Not Stated
JOONDALUP	3.2%	30.3%	44.6%	20.0%	2.6%
TOTAL PERTH REGION	7.8%	36.5%	36.6%	15.3%	3.9%

Source: 2001 Census of Population and Housing (ABS - 2001)

- The percentage of Joondalup households which have 0 vehicles is 4.6% lower than the Perth average.
- The percentage of Joondalup households which have 2 or more vehicles is approximately 23% higher than the Perth average.

Mobility is generally accepted as being negatively impacted in a household when a high percentage of 1 or no car households are recorded (Unless it is an inner city area). This implies that in general terms, mobility is significantly greater than the Perth average and the need for effective public transport to the facility is no greater than average.



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Population Projections

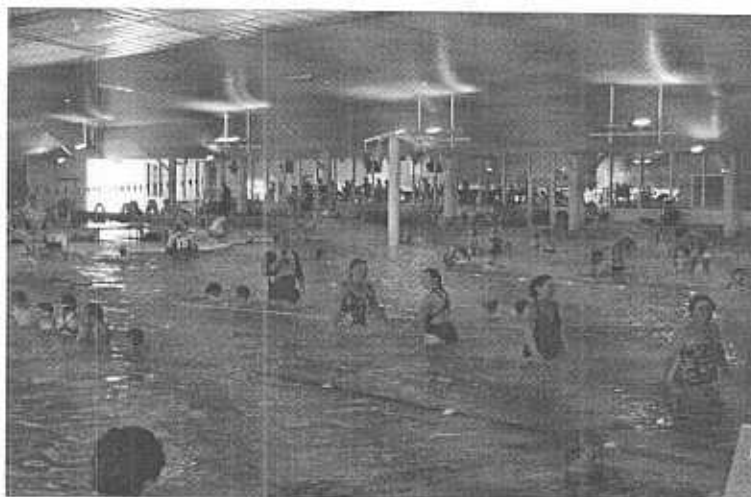
POPULATION PROJECTION	2006	2011	2016	2021	% CHANGE
JOONDALUP	164,900	163,700	166,900	165,900	+0.6%
TOTAL PERTH REGION	1,524,900	1,640,100	1,756,900	1,869,900	+23%

Source: *WA Planning Commission - WA Tomorrow*

- The City of Joondalup's population is expected to remain relatively constant through to 2021. This is in contrast to Perth in which the population is expected to grow by 22% by 2021.
- Neighbouring Wanneroo is one of the fastest growing Local Government Authorities in Australia.

The demand for aquatic facilities would not be expected to increase due to the projected population growth of the City of Joondalup alone.

The new land development that will attract the projected population increase within the City of Wanneroo is expected to attract more families with young children, the typical demographic type that is attracted to new developing areas. Whilst the City of Wanneroo is redeveloping Aquamotion (in the southern end of the City), population growth is planned for the northern areas. If considerable population growth places pressure on the Aquamotion centre, it may result in population living to the west of that centre choosing to utilise CLC.



Craigie Leisure Centre - Leisure Pool



COMPETITOR ANALYSIS

A review of Craigie Leisure Centres competitors has been undertaken to define the key business units of the various competitors. A summary of key prices, facilities, programs and services has been detailed with an overall summary on how the competitor impacts on potential and current Craigie Leisure Centre aquatic based customers. A 'Summary of Business' is detailed after each competitor to outline the key strengths and potential market advantages the competitor may have over Craigie Leisure Centre.

The review on competitors was limited to aquatic facilities that catered for the leisure, learn to swim and lap swimming markets in the northern corridor of the Perth metropolitan area. The detailed Competitor Analysis for Craigie Leisure Centre can be viewed as Appendix 5. to this report.

A list of competitors of CLC in the table below highlights the competitors by type.

Craigie Leisure Centre Competitors	Distance (km)
Local Government Facilities	
Aquamotion Wanneroo	6
Balga Aquatic Ctr	9
Terry Tyzack Aquatic Ctr	15
Bold Park Aquatic Centre	15
Beatty Park Aquatic Centre	17
Arena Joondalup (State Government)	7
Challenge Stadium (State Government)	17
LTS Facilities (Commercial)	
Whitford City State Swim	2
Carine Glades Swim & Health	6
Zest Health Club - Joondalup	6
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Fitness First Balga	7
School Facilities	
Warwick SHS	6
Carine SHS	6
Greenwood SHS	4
Balcatta SHS	10
St Mary's Anglican Girls School	9

In general terms Craigie Leisure Centre enjoys one of the largest catchment areas with limited aquatic facility competition in the metropolitan area. A regional review shows that a large area south of the CLC is void of aquatic leisure facilities. This area is bounded by Balga Aquatic Centre (redeveloped facility under construction), Bold Park



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(outdoor only) Terry Tyzack Aquatic Centre, and Challenge Stadium. The spatial distribution of competitors can be seen in Appendix 1. CLC Catchment Map.

Craigie Leisure Centre is situated at the northern end of this area and therefore is able to draw the market directly south almost exclusively in its primary catchment zone (5-8kms). The major competitor outlined in the review is the Arena Joondalup due primarily to its close proximity, similar range of facilities, programs and services.

Other general aquatic competition is provided by other Local Government Leisure Centres; Aquamotion 6kms to the east, and the soon to be re-commissioned Balga Aquatic Centre 9km to the south east.

Learn to Swim

There are private competitors that compete in the specialist market segment of Learn to Swim within the Craigie Leisure Centre catchment, however of the 5 such facilities only Whitfords City State Swim compete in their area of core business. Fitness First do not conduct Learn to swim or allow public access / lap swimming. The remaining facilities are primarily health clubs which in recent years have begun to use their underutilised aquatic facilities and therefore are not major competitors in this market.

The leisure centres compete in this market and Aquamotion has a well established learn to swim program as does Joondalup Arena.

School Pools

The school pools within the catchment do not open their pools to the general public. They are venues for the Department of Education and Training's Vac swim program and are used by some neighbouring schools by arrangement. They are small competitors in the schools and Vac swim markets.

50m Pool

As noted previously within the report, there is a "gap" in provision of 50m pools in the area bordered by the following facilities; Joondalup Arena and Bold Park, Beatty Park, Terry Tyzack Aquatic Centre (a 23 km stretch north to south). This gap is considered significant and suggests that competition for a 50m pool use would be limited in areas to the south of Craigie Leisure Centre if provided.

Proposed Facilities

- **City of Stirling - Coastal Pool**

The City of Stirling is developing an aquatic facility as part of a State Government election commitment with the sale of the Scarborough High School site. A number of potential sites have been shortlisted and evaluated with the pool is being



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referred to as the "coastal pool" due to it most likely being located west of the Mitchell Freeway.

A report is due to be presented to Council for direction in coming months. Dependant on the location and scale of development, this facility has the potential to become a serious competitor to CLC.

- **Mindarie 50m pool**

An Expression of Interest process is being undertaken presently for the contribution of \$2.4 million for the building of a 50m pool in the Mindarie area which is approximately 18kms north of CLC. A short list of applicants is being considered presently.

This project began as an election commitment in 2005 of \$2.5m to the electorate of Mindarie to provide a 50m pool. (The amount is now \$2.4m grant as \$100,000 has been reserved for potential consultants if required to investigate any proposals or carry out due diligence checks.

This facility would be expected to have minimal effect on the CLC facility due to its proximity and fact that Joondalup Arena is located between it and CLC.

Existing Facility Redevelopment

- **City of Stirling - Balga Aquatic centre redevelopment**

The redeveloped facility will consist of the following facility features;

8 Lane 25m lap pool heated indoor

Leisure pool with beach access

Turbo channel ride

Program pool heated

Interactive water playground (200m2)

Kiosk

This facility is considered to be a district level facility drawing mostly from the immediate 5km catchment. No unique facilities are planned to be provided so it would be expected to compete with CLC for the population catchment living between the two centres, with location being a principle driver of choice.

The main markets this would occur for are the family / entertainment and dependant on the standard of programming the learn to swim and seniors group fitness aqua markets.



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▪ City of Wanneroo - Aquamotion redevelopment

This facilities redevelopment is considered to be quite extensive at \$13 million. The planned aquatic and related features are as follows;

bombic pool
hot pool (hydrotherapy) with ramp and hoist
children's splash pad (outdoors shaded with winter enclosure)
spa
pool features
pool plants (4 in total, for the 3 pools and spa)
expanded change rooms
group change room
family change room

The hydrotherapy pool, which will include ramp access, will give Aquamotion an advantage in attracting seniors, people with injuries and the infant learn to swim market. The construction time frame is estimated at 54 weeks, with full closure of the facility during this time most likely.

Whilst located only 6kms from CLC there are a number of considerable barriers between the centres that act to increase the area between the facilities and divide the markets geographically (Lake Joondalup, Wanneroo Road, Mitchell Freeway)

With a development of unique water playground facilities, it could be expected that the family entertainment market and teens would be affected if CLC was to remain the same as is.

A consideration for CLC is the impending closure of Aquamotion in July 2007 for the redevelopment works of approximately 18 months. It would be expected that the current users of Aquamotion would be split between CLC and Balga Aquatic Centre with the northern and western markets utilising CLC. This will have the effect of increasing attendances at CLC and urgent planning for this increased use should be made by CLC management.



INDUSTRY TRENDS

There are a number of key areas in which the leisure industry is affected by trends. Areas in which trends impact on provision of leisure facilities include;

- Societal trends
- Participation in exercise trends
- Facility trends

ABV has conducted extensive trends research and provides a detailed aquatic industry trends paper on the topic as Appendix 2 to this report on the implications for the leisure industry and for aquatic facilities specifically. Summarised, these trends include;

Societal

- Ageing population, changing demographics.
- High obesity levels and increasing – children and adults.
- Change in workforce structure, increasingly irregular working hours.
- Convenience oriented society.
- Increasing economic value of sports & recreation.
- Increasing safety & security concerns.

Participation

- Physical activity participation rate increasing – much higher levels still required.
- Swimming has third highest participation rate of all activities.
- Greater variety of activities on offer – more competition to attract participants.
- Expectation of high quality activities and facilities.
- Most people participate in physical activity close to home.
- Continued growth in learn to swim market – particularly with adults and pre-school children.

Facilities

- Energy and water efficiency a priority.
- Many aquatic centres built in the 1980's and 1990's are being redeveloped.
- Purpose built private learn to swim facilities increasing in numbers.
- Separate water bodies being preferred to multi use swimming pools.
- Outdoor water playgrounds being built for children's entertainment.
- Move towards integrating aquatics with other community facilities and commercial enterprises.



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Aquatic Facility Participation Trends ERASS 2005

(ERASS – Exercise Recreation and Sports Survey – conducted annually).

- Swimming is the third highest participated form of physical activity in Australia with over 2.31 million people participating in 2005. Overall a drop of 4.35 has been experienced between 2001 – 2005.
- 14.4% of Australians indicated they participated in swimming as a physical activity, the average swimmer swimming 1.25 times per week.
- 15.4% of people in WA participated in swimming, 1.0% higher than the Australian average. This figure has decreased 1.6% since 2001.
- Swimming activity type was broken down to 2.2 organised swimming and 12.9 non-organised [Australian statistics].

Organised Participation

- Of all organised participation, [42% of Australian population], the fitness leisure or indoor sports centre accounted for 13.9%. This is 5.5% less than 2001 which is a significant reduction without apparent reason, warranting further research.
- 18.5% of Australians participated in Aerobics (Group Fitness) with 9.4 % in organised and 10.1 % in non-organised.
- 20.2 % of people in WA participated in Aerobics (Group Fitness), 1.7% higher than the Australian average.

Aquatic Programming Trends

- Leisure facility Managers are reporting continued growth in the learn to swim market. Pre-school children including infants are a particular area of growth.
- According to the ERASS report aqua aerobics has shown reasonable growth of 16% between the years of 2001 and 2005. The participation rate is 1.0% for Australia. Facility managers comment that the popularity of the aqua aerobics classes are very much dependent on the individual instructor. A good instructor will have fully booked classes. This trend applies to other such exercise classes in and out of the water.
- Aquatic programming is beginning to target childhood obesity as specific concern as this topic has received much attention by the media in recent times.
- The development of effective aquatic programmes in leisure facilities is being hampered by staffing shortages. Very low unemployment has made attracting



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and retaining suitably qualified staff even more difficult in a highly competitive environment.

Leisure Facility Trends

Recent Facility Initiatives

To remain vibrant, interesting and viable to the community, leisure facilities must continually be reviewed in order to find new ways to draw the maximum use from its immediate catchment and be unique enough to draw attendances from further than just its local community.

The discerning marketplace will not remain loyal when it has choice. Location is the most cited reason for use of a leisure facility, but with many new developments located within competing catchments, the newest, best optioned facilities win market share.

Some recent facility developments are assisting in the sustainability of leisure facilities;

- Capital Sinking fund – where the organisation that owns the facility is budgeting for the replacement and rejuvenation of the facility over its life span. This gives the facility the chance to upgrade regularly to compete with shifting demands and to remain aesthetically pleasing.
- Asset Maintenance Planning – the organisation that owns the facility is maintaining the facility according to the needs of the building and facilities. In order to remain aesthetically pleasing and functioning efficiently and effectively.
- Increasing the capacity of income producing features – Features such as gymnasiums and cafes are being remodelled and upgraded to accommodate more users and become more efficient by not increasing the need for fixed expenses at the same rate as the increased capacity increases income.
- Introducing new features to enhance the unique experience – the introduction of new features that draw attendances from further than the immediate catchment and are income producing. Features such as unique water slides to existing facilities to add excitement and retain interest in the facility. (eg of retro fitting a facility with exciting waterslides to increase appeal to the teen and family markets).
- Flexibility of use – architects and managers are recommending aquatic facility design to include flexibility of use. In many cases, it may be preferable to opt for a smaller pool spaces, and include ancillary features that allow the pool to be used for a wider variety of activities. Over the



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long term the pool with flexible features such as adjustable floor, shallow water depths, ability to vary heating levels etc will be better able to react to the changing needs of the community.

- Combining facilities and services - the combining of facilities and grouping of similar features can prove cost effective in not increasing fixed costs proportionate to the increased income the addition will generate. Soft play gyms for children are a good example where they can be used by existing programs to enhance their attractiveness (crèche, parties, holiday programs, long day care, etc).

In the eastern states this practise has been followed in the example of combining an ice rink and leisure centre. Apart from the aforementioned benefits, the cross use of each others energy waste products has introduced another benefit of their collocation.

- Reducing water consumption – Climate change has significantly reduced rainfall to many parts of Australia including the South West of Western Australia. Less rainfall will result in an increase in the cost of water and further water restrictions. Aquatic facilities across Australia are beginning to look at water saving measures such as pool blankets and push button taps to decrease water usage. A report by the Premier's Water Foundation in 2006 indicates that simple low cost water savings measures have been shown to have a payback period of less than 14 months in a typical Community Aquatic Centre.
- Alternative sources of energy for heating needs – The use of cheaper sources of energy has been an item most facilities in their development have had considered. The use of heat pumps in lieu of gas, and the addition of solar to existing gas plants has been occurring for over 10 years. Typically the increased capital costs of these cheaper sources forces the abandonment of these plans.

Within the last 3 years the Claremont Aquatic Centre, Challenge Stadium and Craigie Leisure Centre have introduced a geo thermal water heating system. The geo thermal system in Craigie is also providing the source for ventilation heating. State Government grants have been awarded for Somerset (Aqualife) and Terry Tyzack Aquatic Centres to develop geo thermal heating systems also.

The economic rationale of geo thermal is compelling if the capital costs can be accommodated. Craigie Leisure Centre capital costs of implementation were in the order \$825,000. The estimated pay back is 7.5 years without State Government grant and 2.5 years with the grant considered, and will have a further reduced payback if further aquatic



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facilities are built. (The project received State Government funding of \$450,000).

This system also provides environmental benefits in that estimates show the equivalent of 14,000 tonnes of carbon dioxide would be expended with a gas boiler system over the Geo thermal plant's lifecycle. (Geo thermal produces none).

Leisure Facilities Refurbishment Trend

The first wave of indoor leisure pools in Perth provided around the late 1980's early 1990's have begun to go through the refurbishment / redevelopment process. These facilities are not as old as the outdoor pools were when redeveloped and refurbishment decisions may be bought forward comparatively to older outdoor pools due to inferior build quality, more usage and thus wear and tear or falling attendances, average appearance and condition and relevance to the market place.

Leisure Centre provision has had a "boom bust" history with regards to facility redevelopments. The initial development is made at considerable capital cost, and the typical business lifecycle follows until the facility is very old and lacks relevance to the needs of the community when it receives a huge capital injection and the process begins again.

A more even distribution of the capital would ensure that Local Government leisure facilities could reinvent themselves according to the needs of the community at the time. Private business follows this style generally and the hotel industry is a very good example of regular investment into facilities to ensure they are attractive and relevant to the needs of the target audience.

Facility Feature Trends

50m Pools

The Perth metropolitan area has extensive provision of 50m pools, with 36 located in the Metropolitan area (2005). Of these 22 are State or Local Government owned (17 outdoor, 5 indoor) and 14 are School owned (13 outdoor, 1 indoor).

Since 2001 LGA's have built two new facilities (Riverton Leisureplex and Aquajetty) and refurbished / heated the following; Somerset – Aqualife, Terry Tyzack Aquatic Centre and Melville Aquatic and Fitness Centre.

Other metropolitan LGA aquatic facilities with 50m pools that are under review (without definitive plans for the 50m pools) include; Beatty Park Leisure Centre, Armadale Aquatic Centre, Queens Park Aquatic Centre, Claremont Swimming Pool and Bold Park Aquatic Centre. The Balga Aquatic Centre is decommissioning its 51metre pool in its current redevelopment.



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Managers of aquatic facilities report a high need for shade over surrounding pool areas and the pool itself for the summer months for bather comfort and sun protection. The provision of wind breaks is also seen to add to bather comfort for outdoor facilities in the cooler months.

The Department of Sport and Recreation Facilities Branch hold the general view that metropolitan Perth is adequately provided with 50 metre pools currently and funding support for new 50m pool development would require substantial evidence of a need for such.

Learn to Swim Facilities

A recent growth in new and planned private Learn to Swim facilities has occurred within Perth in recent years.

It is suspected that these facilities are being developed as commercial opportunities within rapidly developing new residential areas where the traditional provider of aquatic facilities (Local Government Authorities) are slow to plan or unable to afford early provision of large leisure / aquatic facilities. Examples of the newly developed and planned Learn to Swim facilities supports this trend theory; Forrestdale, Secret Harbour, Erskine, Mindarie, and Ellenbrook.

This is further supported when the Victorian situation is examined with recent agreements being reached with the Education Department to allow private facilities to be developed on Education facility land at no cost for land in return for shared use of the facility in commercial off-peak times.

Aquatic Playgrounds

There has been a recent trend for planning of aquatic playgrounds to be developed at leisure centres. These facilities are characterised by zero or very shallow water depth and extend the concept of the more traditional leisure pools provided over the last 10 years in indoor aquatic centres. These facilities promote an extended play experience for families and pre and primary school aged children

Balga Aquatic Centre is planning a 200m² interactive playground area that will be outdoors, with zero water depth and open in the summer months. Aquamotion is planning to provide an extensive aquatic playground area that will have an enclosure around it to allow year round use. Rockingham Aquatic Centre is exploring the possibilities of such an area currently and Kalgoorlie Oasis has opened an aquatic playground area outdoors with shallow varying depth water (and report that attendances have increased approximately 12% from the previous year as a result).



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ABV Leisure Consultancy researched facility managers, architects, and peak bodies for expected future trends in the leisure industry and the following was identified;

- Emergence of new technologies
- Emphasis on environmental considerations
- Aging populations needs considerations
- Physical inactivity solutions
- Emphasis on childhood obesity solutions
- Increased supervision levels in aquatic environments
- Niche targeting of customer markets
- Increased entry costs to facilities
- Social obligation reporting via triple bottom line

In the article '2050: An Aquatic Legacy?' Andrew Whittaker – CEO of Aquatics and Recreation Victoria Inc describes directions that aquatic facilities are likely to take in the future:

- Commercial Aquatic Facilities – facilities with strong emphasis on attracting large numbers to generate income. They will include water slides, themed areas, water playgrounds, large fitness and health areas and other commercial activities such as restaurant, shops, function centre, beauty salon etc.
- The Community Hub – an aquatic centre as part of a range of community services such as library, medical centre, child care. The emphasis will be on community benefit.
- Partnership Facilities – Local Governments will increasingly look towards partners in developing new aquatic centres due to the increased costs. Partners could include hospitals, shopping centres, management groups and universities.



TREND CONSIDERATIONS

Recent trends in the provision of leisure centres have reflected people's need for choice, high quality and maximum user comfort and experience. Almost exclusively, centre redevelopments have revolved around modernising facilities to suit the needs of the particular community it serves and to allow the facility to be competitive with neighbouring or competing facilities.

The addition, refurbishment and increasing of capacity of income producing features such as health clubs multipurpose areas, highly flexible, programmable water spaces, group fitness and soft play features has also occurred. These features are generally selected on the degree of complimentary services they provide to existing facilities and their ability to assist in the cost recovery and reduction of operating deficits, dependant on capital budgets available.

Recognising the differing needs of users has been featuring prominently in new and refurbished facilities with the example of separate bodies of water heated to different temperatures a focus. Pools such as hydrotherapy, warm water program pools and cooler lap pools all purpose designed are examples of such development trends.

Staging of redevelopments is also occurring and provides Councils the opportunity to provide facilities as they can be afforded and when more user details are known. (This is particularly the case with Greenfield sites). In theory this approach allows quality to be built into the facilities by not placing pressure to build a facility with all the desired features at once. The predetermined features can be built well and when appropriate and can be afforded, the further stages can be added (This strategy has been undermined somewhat in recent times within WA due to spiralling cost escalations in the building trade).

A trend in design is to build facilities with as many different features as possible so as to appeal to the widest possible audience. This approach aims to maximise the facility's ability to generate income, and share fixed costs over a number of income producing features. The facility also allows complete families to utilise the one facility for a number of their leisure needs.

Design of facilities should not only be considerate of the users needs but also the operators in terms of easy, safe and economical operations. This is achieved at design stage via management input to influence design that will minimise staffing requirements and via energy consultants for consideration of alternate sources of energy for heating and cooling.

Craigie Leisure Centre is an example of a modern leisure centre that currently provides multiple aquatic facility options to various user types. Previous planning has promoted the idea of a potential outdoor 50metre pool as a further staged development dependant on need. The trends and issues raised within this section of this report should all be considered within the design of any new provision of aquatic facilities.



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These trends suggest that if further aquatic facilities are needed at CLC they should add to the overall value of the facility by offering something different to what exists at the centre and within the regional context. They should also be able to be operated and managed with minor extra cost to the organisation.



CONSULTATION

The consultation process for this study included the following;

- Local Newspaper advertisement (Joondalup Times) and supporting notices within community leisure centres advising of the study and requesting public submissions on further aquatic facilities at CLC.
- City of Joondalup community random phone survey (250 responses-including 50 non-users), identifying further aquatic needs and satisfaction with current aquatic facilities.
- Random user survey of 200 users of CLC over a 1 week period, stratified to correspond to the weightings of users types at the centre.
- Surveyed 64 schools located within the City of Joondalup.
- Survey all key user groups (34) of the facility.
- Consulted the key aquatic State Sporting Associations for perceived needs for their sport. (From the Craigie Leisure Centre).
- CLC staff workshop exploring needs of users and staff professional opinions.
- Consult with key industry representatives (including architects and centre Managers) to identify industry trends in aquatic centre provision.
- Department of Sport & Recreation (WA, NSW & Vic), to determine current industry trends and DSR WA for level of support for aquatic centre provision in terms of perceived regional need and funding.
- Neighbouring Local Government Authorities to discuss their current and future aquatic facility provision.



Public Submissions

A total of 31 public submissions were received concerning this study. Twenty nine of the submissions are concerned with expressing support of the construction of an 8-10 lane 50 metre swimming pool. One submission commented on a lack of pool walking space and only one submission expressed satisfaction with the current aquatic facilities.

The three main reasons given for the construction of a 50 metre pool are: The current swimming facilities are inadequate for their needs (27); the current swimming facilities are overcrowded (20) and; insufficient access to 50 metre swimming pools for City of Joondalup residents (15).

The main reasons given for the inadequacy of the current 25 metre pool are that it is too short and too shallow for their swimming requirements. Several submissions also stated the water temperature is too warm for lap swimming, and that swimming competitions could not be held due to the lack of grandstands.

Three submissions included comments on other aspects of the Craigie Leisure Centre. They regarded improvements for the change rooms (2) and the overcrowding of the gym (1).

Random Community Survey Summary

250 phone surveys were administered in a stratified (to suburb population) random survey of City of Joondalup residents which included 50 non users of the CLC.

- 95% of respondents were aware of Craigie Leisure Centre (CLC)
- 86% of respondents recorded that someone in their household had used CLC since its reopening in July 2006.
- When asked 'What aquatic based activity do members of your household participate in at the centre?' respondents recorded recreation/fun swimming 33%, lap swimming 28% and learn to swim 16%.
- The most common reported frequency of participation in aquatic activities at CLC respondents was 30% once per week, 24% 2-3 times per week and 20% less than once per month.
- The three most common reasons given for use of CLC were location 40%, facilities 21% and price 18%.
- 33% of respondents mostly like to access CLC between 9am to 12 noon, followed by 12 noon to 4pm 22% and 4pm to 7pm 22%.



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- 62% of respondents describe availability of aquatic facilities when they need them as always available. 25% said the facilities were mostly available and only 3% said never available.
- 25 % reported that there were times when the respondent wished to use CLC aquatic facilities but could not because they were not available.
- 44% of respondents are very satisfied with the 25m Pool depth, followed by 28% who are slightly satisfied.
- 30% of respondents are very satisfied with the 25m Pool lane availability, with 27% neither satisfied nor unsatisfied and 25% slightly satisfied.
- 44% of respondents are very satisfied with the 25m Pool lane width, with 23% slightly satisfied and 24% neither satisfied nor unsatisfied.
- 43% of respondents are very satisfied with the 25m Pool temperature, with 28% slightly satisfied.
- 45% of respondents are very satisfied with the 25m Pool size, with 20% slightly satisfied and 20% neither satisfied nor unsatisfied.
- 55% of respondents are very satisfied with the 25m Pool water quality, with 29% slightly satisfied.
- Overall the greatest dissatisfaction levels for aquatic facilities were recorded for the change rooms, with 13% of respondents slightly unsatisfied and 9% very unsatisfied. 32% were very satisfied, 27% slightly satisfied and 19% neither satisfied nor unsatisfied.
- Respondents were equally divided when asked if there were other aquatic facilities that should be added to CLC, with 52% saying yes and 48% saying no.
- Of those who do think other aquatic facilities should be added to CLC the highest response was given for a 50m pool (70%), with 58% reporting a preference for indoor. The next two most requested aquatic facilities were water slides 37% (51% saying indoor) and water playground 33% (64% saying indoor).
- If the respondents desired facilities were made available at CLC, 39% reported they would use it 2-3 times per week and 28% reported once a week.



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- 76% of respondents reported they would make use of a 50m pool if it were made available at CLC. Of those respondents, 78% reported the provision of a 50m pool would entice them to increase their current usage levels of CLC.
- Of those respondents who reported they would increase their use of CLC if a 50m pool was introduced, 32% said they would increase usage by 2-3 times per week and 28% would increase by once per week.
- 91% of respondents were City of Joondalup ratepayers.
- 61% of ratepayer respondents would not be prepared to pay any extra on annual rates for additional aquatic facilities with 33% will to pay between \$1 - \$49 extra.
- 42% of respondents would be prepared to pay a higher admission fee to use CLC with new aquatic facilities.
- Of those who would be prepared to pay a higher admission fee, 53% would be prepared to pay 0-5% extra, with 39% willing to pay 5 -10% extra.
- Non Users of CLC – 23% reported they had used another facility.

Random Users Survey Summary

200 surveys were distributed to users of the centre randomly (stratified by user categories corresponding to attendance figures of each category) and 181 Random were completed.

Findings;

1. 14% of respondents live outside the City of Joondalup
2. 54% of respondents live at home in a family with pre-school to high school aged children.
3. 76% of respondents live within a 10 min drive from Craigie Leisure Centre (CLC). Only 6% have >15 min driving time from their home.
4. The aquatic based activity with the highest participation by respondents is lap swimming 39% followed by Learn to Swim 18% and recreational/fun swimming 15%.
5. 86% of lap swimmers participate in lap swimming once a week or greater, with almost 40% swimming 2-3 times per week and 30% swimming 4+ times per week.



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6. CLC was chosen by users for the following reasons;
- | | |
|-------------------|------|
| Location | 54 % |
| Services provided | 16% |
| Facilities | 12% |
| Price | 12% |
| Other | 7% |
7. The respondents recorded the following when asked what time of the day they are mostly like to access the CLC aquatic facilities;
- | | |
|------------------|-----|
| 5.00am - 9.00am | 22% |
| 9.00am – 12.00pm | 26% |
| 12.00pm – 4.00pm | 12% |
| 4.00pm – 7.00pm | 31% |
| 7.00pm - | 8% |
8. 51% of respondents reported the availability of CLC aquatic facilities as always available.
- 43% reported mostly available.
6% reported sometimes available.
0% reported never available.
9. When asked if there are times when the respondent wishes to use CLC aquatic facilities but can not because the facilities are unavailable 26% recorded yes, 74% recorded no.
10. When asked to describe their satisfaction with the current aquatic facilities at CLC the following results were recorded;

Satisfaction with current aquatic facilities

	25m Pool depth	25m Pool lane availability	25m Pool lane width	25m Pool water temp	Leisure Pool water temp	Leisure Pool size	Water quality	Change rooms
Very Unsatisfied	16%	6%	3%	3%	5%	8%	4%	9%
Slightly Unsatisfied	8%	12%	6%	7%	6%	11%	4%	11%
Neither Satisfied nor Unsatisfied	19%	24%	23%	22%	24%	25%	18%	23%
Slightly Satisfied	21%	22%	15%	20%	16%	18%	19%	18%
Very Satisfied	36%	36%	53%	49%	48%	38%	54%	38%

11. When asked if there any other aquatic facilities that could be added to CLC that would entice the respondent to use the centre 63% recorded yes.
12. Almost 90% of the respondents that recorded yes to additional facilities said a 50m pool should be added. The next most popular additions as recorded by respondents were water slides 41%, and a water playground 40%.
13. 70% of respondents were City of Joondalup ratepayers.



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14. Almost 40% of rate payer respondents would not be prepared to pay any extra on annual rates for new aquatic facilities to be added and 50% are prepared to pay \$1 - \$49.
15. Almost 40% of respondents are prepared to pay a higher admission fee to use CLC with new aquatic facilities.
16. Of those respondents who are prepared to pay a higher admission fee almost 40% are prepared to pay an extra 0-5% and 45% of respondents are prepared to pay an extra 5-10%.
17. Almost 40% of respondents use other aquatic facilities
- 17a. Other aquatic facilities used by respondents are as follows;
- | | |
|--------------------------|-----|
| Joondalup Arena | 46% |
| Wanneroo Aquamotion | 8% |
| Bold Park Aquatic Centre | 13% |
| Challenge Stadium | 12% |
| Bayswater Waves | 4% |
| Other | 17% |
18. Facilities is given as the primary reason for respondents to use the Joondalup Arena 68%, Bold Park Aquatic Centre 67% and Challenge Stadium 82%.

Schools Survey Summary

Of the 64 schools within the City of Joondalup a total of 19 schools returned completed surveys. (It should be noted that the timing of the survey, late in fourth term may have had an effect on returns. A reminder email notice was sent to all non-responding schools prior to closing date).

Findings

- 47% of responding schools have used the Craigie Leisure Centre (CLC) since it was redeveloped in July 2006.
- 56% of respondents intend to use CLC in the next 12 months.
- 'Facilities' was recorded by 50% of respondents as the reason their school does not intend to use CLC in the next 12 months. 33% of schools recorded 'Location,' and 17% of schools recorded 'Price.'
- 47% of respondents have 5 – 10 mins travel time to CLC and 37% have 10-15 mins travel time.



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- Of the schools that utilise CLC, each school on average use CLC 10 days per year.
- The majority of reported school use of CLC is in Term 4, with some use reported for Term 1. One school reported use in Term 3.
- The majority of schools reported greater usage of the 25m Lap Pool than the Leisure Pool.
- Location is the most important reason for each school that uses the CLC aquatic facilities. Water temperature and facilities rank equal second in importance and price is third.
- 70% of respondents using CLC recorded 'swim lessons' as the reason for using the aquatic facilities.
- 37.5% of respondents are 'Very Satisfied' with the current aquatic facilities at CLC. 25% are 'Strongly Unsatisfied.'

When the respondents were asked for their level of satisfaction with each of the facilities at CLC the following was recorded;

Satisfaction with Current Facilities %

Features	Very Good	Good	Adequate	Poor	Very Poor
Reception/Foyer	89		11		
Car Park	56	44			
25m Lap Pool	78	11		11	
Leisure Pool	72	14	14		
Change rooms	44	44	12		
Family/Disabled Change Rooms	60	20	20		
Spectator Areas	50		26	12	12

- Two respondents rated the spectator area as poor because of the limited area available. One respondent commented on the inadequate lane space of the 25m Lap Pool.
- Six respondents made comments on additional aquatic facilities they require at CLC. Four respondents recorded a 50m pool for training and carnival purposes, one respondent recorded a deep pool for water polo purposes and one respondent recorded a separate set of change rooms for school children to use.
- 67% of respondents reported their school would increase its amount of use of CLC compared to its current level if Craigie was redeveloped to include suggested improvements.



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- 76% of respondents reported an increase in use of 40+% when asked how much their school would increase use of CLC if Craigie was redeveloped.
- Joondalup Arena was the most used other aquatic facility by schools, with Challenge Stadium, Beatty Park and State Swim Joondalup also recording some use within the last 2 years that CLC was closed.
- If CLC was redeveloped and possessed identified improvements, 73% of respondents believe that it is likely that their School would transfer their use from other aquatic facilities to CLC.

Staff workshop – Summary

Staff were asked to consider and discuss two questions to which their responses are recorded below;

1. What do you hear / receive first hand from users as aquatic facility needs?
 - Children 5-12 yrs have little to do at CLC and get bored. They need more facilities and activities to keep them entertained.
 - More space required for recreation and lap swimming. Leisure pool gets overcrowded by general recreation users and the Lap pool gets overcrowded by serious lap swimmers during peak period times.
 - More space required with the right water temperature and depth for classes such as aquarobics.
 - More spectator space required around poolside to accommodate parents supervising their children.
 - Serious lap swimmers are expressing the need for a 50m lap pool for training and competition purposes.
2. Do you think extra facilities are required and if so, what do you think is needed in your professional judgement?
 - The general consensus among staff was that although extra lap pool space was required, a 50m pool may not be necessary. A 25m pool could be a more cost effective way of increasing lane space for lap swimmers.
 - There is currently nothing for children to do in the Leisure Pool and they get bored and become difficult to control. Extra facilities in and around the pool are required to keep the children entertained.
 - Additional pool space of sufficient depth and water temperature is required to meet demand for classes such as aquarobics.
 - Overcrowding of the Leisure pool during peak usage times needs to be alleviated. This could be achieved through increased pool space or additional facilities outside of the pool to draw users out of the pool.



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Conducting similar activities in other parts of the centre during the peak usage times could also be utilised to relieve pressure on the Leisure Pool.

Other points raised during the staff consultation include;

- Although some high schools report that they would increase their usage if additional lane space was provided, it is suspected that usage would remain the same based on prior staff experiences with high school users and also taking into account the shortage of teachers qualified to lead swimming excursions.
- Primary schools generally use swimming pools for a period of 10 weeks for swimming lessons mostly during term 4. Staff are having some success in getting primary schools to be more flexible with their booking dates so as to spread the demand for the 25m Lap Pool throughout the year.
- Almost all high schools use CLC for a short period of time just before they hold swimming carnivals in term 4. This means that they are unwilling to change their booking dates to other times of the year.
- Any additional pool or pool modifications should avoid dramatic sloping gradients to achieve varying depths. Areas with such sloping gradients are less satisfactory for conducting classes in the water.

External User Group Surveys Summary

Ten (10) external user group submissions were received concerning this study (39 distributed).

West Coast Masters Aussi Swimming Club

This group has a current membership of 120 members. They currently use the 25m Pool at Craigie Leisure Centre (CLC) twice a week. The Club is currently not satisfied with the current 25m Lap Pool because of overcrowding and being too short for their requirements. The Club believes it would increase use of CLC to 3 times per week for training and competition purposes if a 50m pool was constructed.

Breakers Swim Club

This swimming club uses CLC to train 4+ times per week; however, they have stated they would like to train more often at CLC. The Club does not use CLC as often as they would like because facilities are not available at their desired time, and facilities are not large enough to accommodate them. The Club is unsatisfied with CLC facilities because of unavailability of lanes in the 25m Pool. The Club believes it would increase frequency of use of CLC for training and competition purposes if a 50m pool was constructed and would be prepared to pay increased entrance fees.



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North Coast Tri Club

The Club currently uses the 25m Pool at CLC once a week. The Club does not use CLC as often as they would like because facilities are not available at their desired time, and specific required facilities are not available at CLC. The Club is slightly satisfied with the facilities at CLC. The Club believes it would utilise CLC to 2-3 times per week for training and competition purposes if a 50m pool was constructed and would be prepared to pay increased entrance fees.

WA Disabled Sport Association

This Association currently uses the Leisure Pool at CLC less than once per month. They do not use CLC as often as they would like because facilities are not available at their desired time. The Association is slightly unsatisfied with overall facilities at CLC. They are slightly unsatisfied with the change rooms but very satisfied with the Leisure Pool water temperature and quality. The Association does not have a need for additional facilities at CLC and would not be prepared to pay increase entrance fees for any redevelopments.

Carine Aussi Masters Swimming Club

The Club does not currently utilise CLC as the facilities are not large enough to accommodate them. The Club is slightly unsatisfied with CLC aquatic facilities. The Club believes it would utilise CLC to 2-3 times per week for training and competition purposes if a 50m pool was constructed but would not be prepared to pay increased entrance fees.

Trigg Surf Life Saving Club

The Club currently uses the aquatic facilities at CLC once per week. They do not use CLC facilities as often as they would like because facilities are not available at their desired time. The Club is very unsatisfied with the current aquatic facilities at CLC. Specifically, the Club is very unsatisfied with the 25m Pool lane availability and slightly unsatisfied with the water temperature (too warm). The Club believes that a 50m pool, spectator stands and benches for bags are needed and would utilise CLC 4+ times per week if they were provided. They would be prepared to pay higher fees for use if the additional facilities were developed.

Community Physiotherapy Services (CPS)

CPS uses the Leisure Pool at CLC once per week. They do not use CLC as often as they would like as specific facilities are not available (water space 3m x 5m at depth 1.2m – 1.5m). They are very unsatisfied with the current facilities at CLC and have discontinued future bookings citing inadequate facilities and overcrowding as reasons. CPS is very unsatisfied with the Leisure Pool Design and believes a depth of 1.5m is required over a larger area for seniors physical rehabilitation. If these facilities were provided they would use them 2-3 times per week and would be prepared to pay higher fees for use.



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Special Olympics WA Inc.

The organisation uses the 25m Pool at CLC once per week. They do not use the centre as often as they would like because the facilities are not available at the desired time. The Organisation is very satisfied with the current facilities at CLC, but is only slightly satisfied with the 25m Pool lane availability. They believe an indoor heated 50m pool is needed at CLC for long course competition training. If this additional facility was built, the organisation would use CLC 2-3 times per week and be prepared to pay higher fees for use.

Complete Physiotherapy

The Organisation uses the Leisure Pool at CLC 4+ times per week for 2 months of each year as backup when they are unable to use their local pool in Carine. They are very satisfied with the facilities at CLC, although they are slightly unsatisfied with the leisure pool depth (too shallow). They do not have a need for additional facilities at Craigie, however, if a deeper hydrotherapy pool heated to 32+ degrees was provided they would be prepared to pay higher fees for use.

Department of Education and Training (DET)

DET uses the aquatic facilities at CLC 4+ times per week. They would like to use CLC more often however the facilities are not large enough to accommodate their needs. DET is very satisfied with 25m Pool lane width and Leisure Pool temperature, but only slightly satisfied with 25m Pool lane availability and Leisure Pool design. They believe a 0.7m – 0.8m depth water space is required for teaching young children to swim and additional deep water space is required in order to teach older children survival skills. DET would use these facilities 4+ times per week if they were provided at CLC, however they would not be prepared to pay higher fees for use.

Specific program details include;

Vac swim program is at full capacity – this program is in need of more water space as is the Interm school swimming program. Schools are being encouraged to participate in the programs during winter (rarely done before).

Since re-opening, CLC has quickly re-established these school based programs and an additional VacSwim program is now run compared to 2002-2003. People are turned away from Craigie during VacSwim program as there is limited water space available and assigned to the program.

VacSwim at CLC will record 20,500 entrances and Interm swimming 73,500 entrances this year. The Manager of the program Mr. Gary Shaw is confident that with additional water space more enrolments in both VacSwim and Interm swimming could be accommodated.



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State Sporting Associations

WA Swimming Association – Mr David Toll, Executive Director.

The northern suburbs have been identified as a growth area for WA Swimming with particular growth reported in Masters and school based swimming.

There has been no specific feedback from clubs regarding need for more facilities regarding CLC. Regarding a 50m pool need.

WA Swimming advises that Joondalup Arena can no longer hold State level events due to FINA requirements of a 10 lane pool. Therefore a wish list request would entail a facility to compliment Challenge Stadium that meets FINA requirements with electronic timing, seating capacity for well over 2,000 on both sides of the pool and be able to be closed to the public for events.

WA Diving – Jo Richards, Executive Officer.

Ideally a facility suitable for diving in the northern suburbs is required that can provide use all year round (indoor and heated water). Currently WA Diving utilise Challenge Stadium, Beatty Park Leisure Centre and Claremont Pools with St Mary's and Penhros school facilities.

The Association have approximately 300 divers registered and report a lot of enquiries about diving from the northern suburbs.

Typically a club holds 6-7 sessions per week with a beginners learn to dive program once per week. Facilities required include; a 1 metre and a 3 metre springboard (approximately \$15,000 plus mounting and ladders) with deep water (3.5 metres). This deep water area can be accommodated within a 50m pool but is preferable to have an offset from the lanes such as the Melville Aquatic Centre.

Diving is a small sporting pursuit and as such has limited funds and relies on grants for supporting facilities.

WA Water polo – Michelle Phillips-Kiely, General Manager Development.

WA Water polo have made a submission on their ideal needs for a water polo facility. The association report that there are no public water polo facilities from Challenge Stadium to Joondalup Arena, therefore further facilities at CLC are seen as an opportunity.

WA Water Polo is very interested in working with the City of Joondalup to develop further facilities for water polo. The potential redevelopment of Craigie Leisure Centre with the potential development of a 50m pool is seen as providing an ideal opportunity for the sport of water polo.



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The WA Water polo submission to the City of Joondalup as part of this report can be viewed as Appendix 3. to this report. A summary of the facility requirements for Water polo to be played include;

Water polo matches - A Grade, National League and Flippa ball (modified);
Field of Play: 25mx20m
Depth: 1.8m for 25m
Water Temperature: 26 degrees
Light intensity: not less than 600 lux

Consideration could be given for the 50m pool to be built 25m wide. This would allow "across pool" set-up so two games or coaching of Flippa ball could be conducted simultaneously with up to 52 children in the deep water.

Coordinator Community Services, City of Joondalup - Julie Eaton.

Julie offered the following general points regarding aquatic needs for the specific populations she works with at the City of Joondalup;

Aquatic needs of young people

- close to public transport
- affordable entry fees
- fun and energetic activities designed specifically for young people
- wave pool
- pool parties with music
- asking young people for their ideas when developing facilities or programs

Aquatic needs of seniors

- close to home
- close to public transport
- affordable entry fees
- facilitated exercise sessions designed specifically for seniors
- hydrotherapy
- asking seniors for their ideas when developing facilities or programs

Aquatic needs of those with disability

- wheel chair hoist or ramp for dignified entry into the water
- hydrotherapy
- access to pool space for groups with special needs
- staff who have open minds and are willing to learn if they are not familiar with particular special needs

Aquatic needs of those from culturally and linguistically diverse backgrounds

- sessions for Muslim women on their own (cultural practices prevent communal swimming)



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A number of these initiatives are present at the current CLC facility and most of those mentioned above are achievable through effective and targeted programming as opposed to new facility provision.



Craigie Leisure Centre – 25m Pool



CONSULTATION - KEY FINDINGS

The key findings from the consultation were;

- 29 Public submissions were made supporting the need for an 8-10 lane 50m pool, due to the current facility being inadequate for their needs, overcrowding and insufficient access to 50m pool within the City of Joondalup.
- The random community survey found that;
 - 25% of respondents reported that facilities are not always available for use when they require them.
 - 52% believe that further aquatic facilities should be provided at CLC, with 70% requesting a 50m pool (slightly more requesting indoors 52%), 37% requesting water slides and 33% water playground facilities (mostly required indoor).
 - If a 50m pool was available 78% reported they would increase their current levels of usage by 2-3 times per week (32%) and at least once per week (28%).
 - A reasonably high level of support for a 50m facility is evidenced by the fact that 33% of ratepayers surveyed would be prepared to pay \$1-49 extra in their rates per annum for the provision of a 50m pool.
 - 92% of respondents were prepared to pay up to 5% extra in admission fees if the facilities they desired were provided, indicating a serious level of desire for further facility provision at CLC.
- The random user survey found that;
 - 46% reported that facilities are not always available for use when required with 26% reporting that it has prevented them from using the facilities. This is further supported by 18% reporting specifically that they were very or slightly unsatisfied that 25m lane availability.
 - A high level of support for further facilities was reported with 63% supporting further facilities added to CLC.
 - A 50m pool was well supported with almost 90% of those supporting extra facility provision, whilst 41% suggested waterslides and 40% a water playground.
 - The support for the above facilities was established with 50% of the respondents who were ratepayers (70%) prepared to pay \$1-49 extra rates and 85% of respondents prepared to pay up to 5% higher admission fees (45% reported 5-10% higher fees) if their suggested facilities were provided.



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- The Schools survey found that;
 - 6 schools reported that they required further facilities at CLC, with 4 specifically requesting a 50m pool for swim training and carnivals.
 - 50% of schools reported facilities as the main reason for not intending to use CLC within the next 12 months.
 - If the CLC provided the desired facilities, 67% of those schools responding reported that they would increase use of CLC (averaging 40% increase in use) with a similar percentage reporting the likely transfer of existing use from other facilities.
- The staff workshop found that;
 - Children particularly aged between 5 and 12 years of age have very little on interest at CLC.
 - The 25m pool and leisure pools are very congested at peak demand times and extra capacity is required to accommodate users at these times.
 - Further aquatic provision should have a relatively flat floor for programming needs.
- Existing user Groups of the Centre report;
 - Most are unsatisfied with facility availability.
 - Most (60%) request specifically a 50m pool, and that they would increase use from 1 – 4 times per week if provided.
 - Physiotherapy groups (2) report a need for further warm water indoor pool space with greater area of deeper water (1.5m).
 - The Department of Education and Training (major facility user with over 59,000 attendances per annum) report that the facilities are overcrowded for their needs
- The State Sporting Associations generally support a 50m pool being developed to their individual sports specification needs.



FACILITY DEVELOPMENT OPTIONS

Based on the consultation with key stakeholders, a desire for 2 predominant types of aquatic facilities have been expressed; a 50 metre pool and children's aquatic play facilities (including water slides). Random community consultation indicates that over 36% of the total City of Joondalup community support a 50m pool addition to CLC and approximately 20% support an aquatic playground and slides.

The provision of these facilities is supported by the very high patronage numbers experienced within the centre since its reopening. The demand at peak times for the various markets has led to a reduced quality of experience for users due to overcrowding and a reduced availability of facilities at the desired times by users and user groups.

The provision of these facilities would serve to alleviate this peak demand and attract potential increased usage from current users with the potential to attract new users to CLC.

Current demand

The current demand for facilities at CLC has surpassed all projections by the Centre management. At times it is reported by staff and supported through consultation with users that certain areas of the aquatic facilities are not available at peak times and use is sometimes not possible at all when desired.

Whilst alternative programming can alleviate this peak demand somewhat through efficient bookings of hirers and redirecting groups to different times (if available), there is no evidence to suggest that poor management practises exist in this regard.

The recreation / family market and casual swimming markets are not easily managed due to the vast majority being casual in their usage habits. When a facility is overcrowded or only partially available the quality of experience is diminished. This market segment demand can be alleviated with the spread of attendances over more facilities suitable to the market.

The provision of extra aquatic features suitable for children such as a water playground with slides will serve to alleviate the peaks in usage for weekends, between 9.00am and 4.00pm, particularly during the summer period.

A further body of water that is flexible for type of use would also assist in this regard, allowing both formal use for groups such as clubs and lap swimming / training but also able to be used for programming of group fitness classes and recreational informal use.



Projected Demand

Many of the user groups have stated that they would increase use if further facilities were provided that allowed more available times for their activities. (Breakers swim club, some schools, Triathlon and Surf clubs as well as the Department of Education and Training).

Whilst it is common for groups and individuals to report that they will continue to participate regularly throughout the year statistics show that the cooler 6 months of the year account for approximately 30% fewer attendances than the warmer 6 months. The major area of users which diminish in these months are the casual, recreational swimmers and the learn to swim markets. This would suggest that an outdoor aquatic playground area would be used less frequently during the cooler months.

The user groups indicating a need for a 50m pool have reported increased use of 25% to 400% on their current usage levels. These groups are likely to maintain their usage throughout the year. It is not known in detail whether this increased usage would come from current members / participants or redirected attendances from other venues, however indications from consultation are that it is mostly latent demand that will be accommodated.

A water playground was also reported as likely to increase current usage of CLC from people wanting such a facility. Estimates range widely on the amount of increased use that would be made, however based on Kalgoorlie Oasis experience a 10-12% increase could be expected overall for children's casual swimming attendances from current levels. (This can be influenced by competing options for entertainment market for children within the area)

Recommended Facilities

The following are the recommended facility options with featured design characteristics suitable to meet the needs of the majority of the stakeholders as expressed within the consultation for this project. These findings have been considered in light of modern best practice and trends in facility provision balanced with cost versus benefits.

50 Metre Outdoor Pool

A very high level of awareness was apparent within the City of Joondalup community and users of CLC during the course of this study. This may be due to a number of reasons including the issue of a 50m pool being proposed as a further stage of development for CLC when it was recently redeveloped. It may also be a product of comparative provision expectations given the large gap that exists between Joondalup Arena and Beatty Park Leisure Centre / Bold Park, Terry Tyzack Aquatic Centres for provision of a 50m pool.



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There is considerable support and rationale for increased water space that can accommodate lap swimmers, schools, recreational and programmed activities at CLC. The specific need for a 50m pool is apparent with users and groups desiring a facility for competition and training needs. Most of the other types of use can be accommodated within 25m pool configurations, although the level of increased pool space capacity required is very difficult to quantify. The advantage of a 50m pool at CLC is the mix of overall facilities it would provide the community with.

A 50m pool with flexible characteristics such as relatively shallow water depth and potentially a moveable boom will allow the maximum user types to utilise the facility.

Shallow water depth allows the maximum use options. To allow swimming competition diving a depth of 1.5m is required for the use of starting blocks and this level could reduce to approximately 1.1 – 1.2 metres at the shallow end, providing a steady and slight gradient allowing programs such as water walking, aquarobics and other instructor led classes to accommodate the greatest number of participants in comfortable water levels (currently the pool depth changes are considered too steep for effective classes with large numbers).

The need for elite swimming competition standard design features was not considered significant and would require expensive minimum design specifications to accommodate for limited use. This level of facility is also not consistent with the City's provision of a community leisure centre and is not supported within the WA Government State Facilities Plan.

Shallow water depth will serve to prevent the WA Water polo and WA Diving utilisation of the facility. The facility needs for these groups to be accommodated are considered to be too specific for the CLC when considering cost versus benefits to the greatest number of people within the community.

An outdoor 50m pool will also provide an outdoor pool option to compliment the overall pool facilities at CLC available. This feature would require supporting facilities such as shade for users in summer months and wind protection in winter months to maximise bather conditions and result in maximum utilisation.

Spectator capacity has also been reported as important for user groups planning competitions and events at the centre in a 50m pool. The number of carnivals that schools are likely to hold, combined with potential club events is minimal overall (other large community leisure centres report between 10 – 25 p.a.). Therefore a cost effective approach to such need could be to construct tiered terraces on one side of the pool suitable for approximately 500 spectators designed to allow for regular users to sit and socialise, exercise and accommodate bags and possessions. The area could have a mixture of grassed and paved surfaces and shade structures to accommodate this.



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For carnivals and events exceeding such spectator need, design could allow area for temporary seating to be constructed and configured as required. (Traditionally the carnival season is condenses into a 6 week period therefore allowing a cost effective arrangement such as temporary seating to be employed).

A moveable boom for the 50m pool could contribute to flexibility of the facility by allowing two 25m or one 50m pool configurations. This feature adds significantly to the capital costs of facilities (Approximately \$300,000 for the motorised boom and the pool is required to be 1 metre longer to accommodate). Whilst a moveable boom may provide increased flexibility of use it would not be considered an attraction or contribute to increased use of the facility in its own regard. Mobile lane booms are available and used at some 50m pools to provide lane flexibility of use and could be considered as a cost effective option to provide such flexibility of use if required.

Outdoor Water Playground

Outdoor aquatic facilities have been diminishing across Perth over the last 10 years due to their redevelopment into year round indoor heated opportunities providing a consistent level of provision, service and reduced operating deficits.

The concept of a day at the pool for the family has somewhat disappeared due to this reduction in facility options as it is hard to relax for any length of time in tiled indoor areas with most of the floor space occupied by programmable aquatic options.

A recent trend in the USA and in theme parks across Australia where the length of stay is valued and encouraged, (resultant increased secondary spend and increased satisfaction with perception of value and experience) has seen the addition of outdoor aquatic play options. These options range in style and scale but primarily serve the purpose of children's entertainment features for warmer weather.

Outdoor aquatic playgrounds have usually been provided as a part of a leisure pool in Leisure and aquatic centres. The theme park provision of these facilities has been without pooling water, often referred to as "zero water depth". This concept has numerous advantages over the traditional leisure pool provision;

- cost to construct is considerably cheaper
- requires no supervision according to the soon to be implemented Health Act requirements due to no pooling water
- operations and maintenance will be less expensive over the long term – less water volume requiring less chemicals, less water loss, less infrastructure to maintain and replace

The zero water depth aquatic playground also offers variation to the overall CLC aquatic facilities mix. A typical outdoor leisure pool would be duplicating the existing indoor leisure pool.



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An outdoor water play environment is high in entertainment value for 2 - 12 year olds and their families whilst being low cost in terms of operating expenses including supervision. It should also be of such significance that children would want to visit the centre specifically for these features and adults happy to bring children for the same reasons as well as being comfortable in the surrounds. As such water features over an area of approximately 150 - 200 m² should be considered as a minimum.

The area also needs to be non-slip to ensure children are not injured whilst running in the area. To facilitate this, a surface similar to the soft fall material used in parks under play equipment is utilised. This will also cushion / break inevitable falls as they occur.

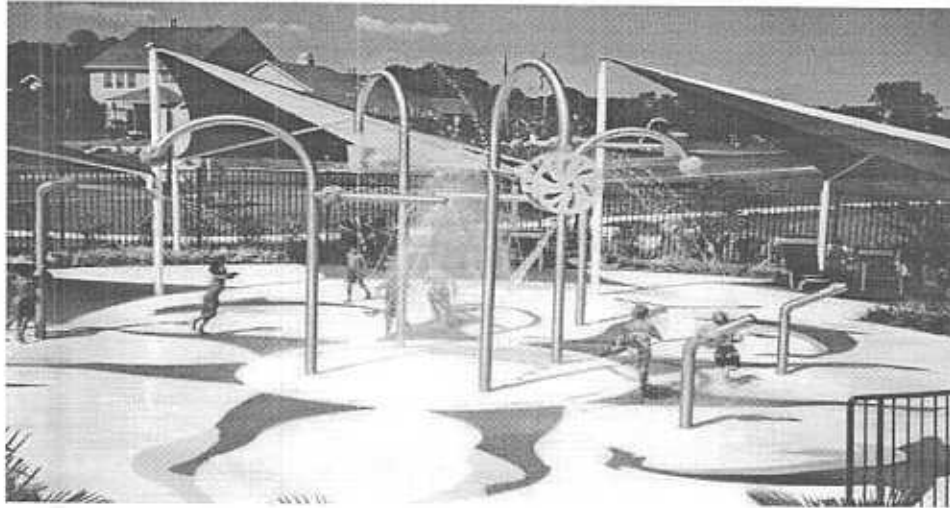
The high level of desire expressed within consultation for water slides can be accommodated within the water playground concept. Use of natural land height falls and landscaping can ensure that slides are low risk in terms of height form ground and integrate into the playground seamlessly. The use of gently sloped finishes to the slide and soft rubber landing surfaces will not require dedicated staff supervision. These features may be best targeted at the lower primary school aged children.

This area should have high public visibility from inside and outside the venue to ensure maximum exposure as the visual of such a facility will attract children due to its interesting forms and bright colours. It should also have a close proximity to the café and be complimented with various seating arrangements for parents and guardians to comfortably supervise and enjoy the experience.

Currently it appears there are no such water features within public swimming pools within Perth. There is an very small outdoor park version located within a park in Highgate that is free to the general public and a number of redeveloped facilities have canvassed the idea of such facilities with Balga Aquatic Centre having an outdoor aquatic adventure playground installed as part of its major redevelopment (interactive water features within the area of approximately 200m²). The planned redevelopment of Aquamotion has a water playground also planned as part of its redevelopment due to open in late 2008. As yet there has not been such provision within a Perth public swimming pool.

The City of Kalgoorlie has developed an outdoor aquatic component to its Oasis Leisure Centre aimed very much as an entertainment venue option for the wider region. Below is a picture of the Kalgoorlie Oasis development which has been in operation for approximately 12 months. It should be noted that the Kalgoorlie development has pooling water which is not recommended in this instance due to the staffing requirements associated with such features. The following photograph of a "Vortex" (brand name) pool in the USA shows the type of surface and setting recommended for CLC.

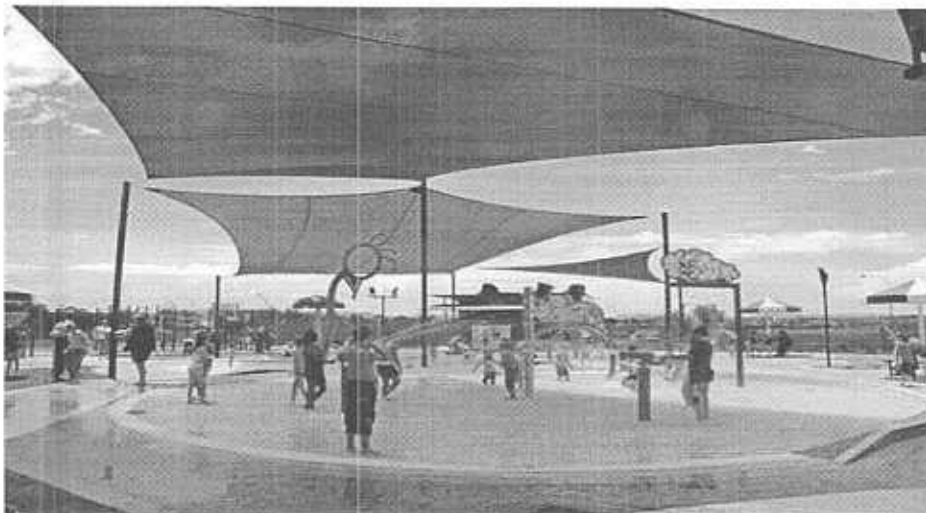
Visual depictions of more outdoor water playgrounds can be viewed at www.waterplay.com.



Example of a "Vortex" outdoor water playground (USA)

The outdoor water playground re-uses water that is sprayed from jets so that the majority of water lost is through evaporation and what children take away on them. The water is collected through small return vents around the playground, passes through the filtration system again and is resprayed from jets once again. The concept ensures that minimal water loss is experienced.

The water for the outdoor water playground pool could be run through an outdoor 50m pool filtration and heating system, avoiding duplication of pool plant for both facilities.



Kalgoorlie Oasis Outdoor Aquatic Play Area



Cost Estimates

Outdoor Water playground

The only real example in WA that can assist with the preliminary estimation is that of Kalgoorlie Oasis. This centres capital equipment costs (not including pool basin and finishes) were in the order of \$200,000. (Approximately 18 months prior to this report). Cost escalation on this figure would need to be accounted for which is countered by the higher costs associated with transport and construction in a regional centre. Other costs not included are; plumbing and connection to the centres existing water filtration system.

The Rockingham Aquatic Centre obtained a quotation for an outdoor water playground over 12 months ago that was approximately \$200,000 for features only. The Balga Aquatic centre redevelopment has an allocation of \$150,000 for interactive water features only for its re-development.

The City of Wanneroo have made preliminary design plans for a component of the Aquamotion redevelopment which includes a large sized water playground with initial estimates indicating over \$1 million (Further investigation as to what exactly is included within these prices is recommended at a feasibility stage of reporting).

The cost of the non-slip cushion surface is not known at this point in time. The distributor of the play equipment, Miracle Recreation Equipment, advises against using this type of surface due to its exposure to the sun and chlorinated water, estimating that a degrading of the surface quality would occur to a level where consideration of replacement is made at 5 years (no evidence of this could be provided as yet). Theme parks on the Gold Coast currently provide this style of surface.

Alternative nonslip surfaces would require sourcing and costing if this type of surface was determined as non suitable (Geraldton Aquarena report preliminary investigations into a similar facility with a "pebblemix" type surface as potential base)..

50m Outdoor pool

The cost estimates for an outdoor 50m pool with landscaped and paved area, tiered seating, shade structures over seating and concourse area and provision for shade shelters to be employed over sections of the pool could be expected to be in the vicinity of \$6 million.

These estimates are based on the following recent examples of cost estimates for similar facilities;

- The City of Joondalup obtained a cost estimate from Quantity Surveyor RBB in July 2006 for a 50m pool consisting of all siteworks, tiled pool, tiered seating for 1,000 spectators in competition format, shade structures,



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landscaping, paving, plant and filter, and consultancy fees at an estimate of \$5.77 million if started in 2007. (See Appendix 4, for break down of those costs).

- Donovan Payne Architects advise that St Hilda's Anglican School for Girls in Kalamunda recently planned an outdoor 50m pool at a cost estimate of \$3.6 million for pool with supporting plant at approximately \$3.6 million (2005).

An estimate for connection to the geo thermal heating system is not known and is without precedent in WA in terms of adding pools to existing system. The system was designed to be capable for a future body of water such as a 50m pool to be added and will require some works to effect that connection. A cost estimate for this work should be gained as part of the detailed feasibility stage of the project.

Funding Opportunities

CSRFF

The most likely funding source for the facilities recommended within this project other than the City of Joondalup, is the WA Department of Sport and Recreation (DSR) Community Sport and Recreation Facilities Fund (CSRFF).

Department of Sport and Recreation staff within the Facilities section believe that there is a sufficient number of 50m pools within the Perth metropolitan area. Therefore to obtain funding of up to \$1.8 million maximum (based on one third of the total project costs), the City of Joondalup would have to show that there is a need for additional specific water space and that the proposed facility would not simply cause a redistribution of users from other centres within the region.



OPERATIONAL IMPACT

The following operational cost estimates are for indicative purposes only. They are very broad and based on potential facilities that have limited design specification detail. A budget impact estimate is provided to summarise the possible net result to the CLC with the proposed new aquatic facilities.

Outdoor Water Playground

Projected attendance increases from the provision of an outdoor water playground can be based on the Kalgoorlie results as a benchmark. Kalgoorlie Oasis management estimate that aquatic attendances are up between 12 and 13% (this averages 50 – 60 more people per day for Kalgoorlie) from the same time in the previous year (over the 5 month season that the facilities are open in Kalgoorlie). Applying a conservative estimate of 10% increase in attendances at CLC over the 6 month warmer season (November to April) it would result in an increase in attendances of approximately 17,000 directly attributable to this facility. The projection of potential attendances based on a projected attendance base is very approximate and should be read only as indicative.

Assumptions

- Projections of potential attendances are based on at the ratio of 30% adults and 70% children.
- Current adult and children casual entry prices.
- Secondary income is based on \$0.04 cents net per attendance

Given the area does not require dedicated supervision due to non-pooling water, an increase in salaries should be minimal. Given that a 50m outdoor pool is also recommended one lifeguard would be present at that body of water, which will be within close proximity of the water playground.

- Peak times in summer months require one extra lifeguard for general supervision when busy - an allowance of 1 extra lifeguard 4 hours per day on week ends, for 4 months of the year has been made. (1* \$21.00 per hour * 8 hours * 16 weeks per annum = \$2,700).
- Utilities would be expected to increase in order to run pumps for moving water and filtration systems only as water heating could be accommodated by the geo thermal heating system. An indicative estimate of \$3,000 for power costs has been allowed.
- No allowance has been made for lifecycle cost replacement or annual asset maintenance.



Outdoor 50m Pool

Projecting attendance impact from the inclusion of a 50m outdoor pool is difficult due to no other centres with 50 pools maintaining separate records for use of the 50m pool.

Increased use of CLC due to having a 50m pool is projected to come from swimming groups such as the existing swim club, triathlon clubs, surf clubs and regular lap swimmers. The facility will provide increased programming capacity for the centre programs of group fitness, swim fit classes and squad swimming.

Users will be attracted that prefer outdoor aquatic centres for lap swimming and recreational swimmers in summer that prefer outdoor pools with area to relax and stay would be expected. As well as increased use from existing users and groups, school carnivals and training will be possible and demand spreading in peak times will ensure a more comfortable experience for users and allow for growth in these areas.

Assumptions

- Attendances increased by 10% on current projected annual attendance for 2006 / 07 = 28,000 (70% adults, 30% Children).
- Opening hours are as per normal centre opening hours for October – March (6 months – 97 hours per week) and for the winter 6 month period of 87.5 hours with closure of 50m pool at 7.00pm Monday – Friday and 5.00pm weekends and public holidays.
- Aqua group fitness classes an extra 4 per week over 50 weeks at 45 per class with 25% paying casually.
- Secondary income is based on \$0.04 cents net per attendance, (\$0.03 merchandise and \$0.01 kiosk).
- Schools – 12 carnivals per year with average of 600 students, paying \$1.50 per head per carnival.
- A lifeguard is present for every hour of facility opening plus an allowance of 2 extra hours per day for cleaning duties plus 500 hours to allow for 4 hours of second lifeguard on week ends and January school holidays.
- Water for 50m pool (and aquatic Playground) has been estimated at \$25,000. This covers ongoing operating water replacement costs.
- Utilities would be expected to increase in order to run pumps and filtration system only as water heating could be accommodated by the geo thermal heating system. An indicative estimate of \$10,000 for power costs has been allowed which should also include concourse lighting.
- No allowance has been made for lifecycle cost replacement or annual asset maintenance.

Please see an approximate projected operating budget for CLC with an outdoor 50m pool and water playground facility below. These projections are based on extending current operating performance for CLC Year to date which signifies their approximate nature.



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CLC Estimated Operating Budget Impact New Aquatic Facilities			
	Attendances	\$ income	\$ Expenditure
50m Pool			
Income			
General attendances	28,000	\$92,120	
Schools - carnivals	6,000	\$9,000	
Schools - attendances	1,500	\$3,800	
Aqua group fitness	9,000	\$20,900	
Secondary income		\$1,780	
TOTAL	38,500	\$127,600	
Expenditure			
Utilities			\$10,000
Water			\$25,000
Lifeguards			\$126,800
Aqua instructors			\$8,200
Superannuation			\$11,205
TOTAL			\$170,705
Water Playground			
Income			
General Attendances	17,000	\$66,640	
Secondary income		\$680	
TOTAL		\$67,320	
Expenditure			
Utilities			\$3,000
Lifeguards			\$2,700
Superannuation			\$243
TOTAL			\$5,943
Combined Totals		\$194,920	\$176,648
NET Surplus / Deficit			18,272

This improvement shows that the addition of the new facilities is likely to have a neutral effect on existing budget performance. This position is enhanced greatly by the ability to utilise Geo thermal heating which is broadly estimated to save \$100,000 p.a. for the equivalent water if heated by gas boiler system.



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No estimate has been made for maintenance or life cycle replacement costs (this should be pursued within a detailed feasibility stage if the additional aquatic facilities concept is supported).

Comparative Attendances at Large Multi-purpose Leisure Centres.

CENTRE	2002 / 03		2003 / 04		2004 / 05		2005 / 06	
	Centre	Aquatic	Centre	Aquatic	Centre	Aquatic	Centre	Aquatic
MAFC	505,247	352,796	556,856	388,760	531,314	368,929	526,143	368,300
Aquajetty			514,248	331,839	654,436	395,112	735,252	414,252
TTAC	550,000	412,500	610,000	457,500	646,999	476,454	660,614	505,761

Key:

MAFC = Melville Aquatic & Fitness Centre

Aquajetty = Warnbro Aquajetty

TTAC = Terry Tyzack Aquatic Centre

The above table indicates the attendances that are experienced at other large multi purpose leisure centres within Perth that have opened in recent times and have a 50m pool. (Aquajetty is a new centre with an outdoor 50m pool, Terry Tyzack Aquatic Centre is a redeveloped pool with an outdoor 50m pool and Melville Aquatic & Fitness Centre is a redeveloped centre with an indoor 50m pool).

Comparing projected CLC attendances when added facilities are considered shows that 280,000 attendance estimate is conservative and certainly achievable. It should be noted that most facilities incur a reasonable increase in attendances for the second year of operations of approximately 10%.

"Honeymoon period" for attendances

Speculation exists within the industry that aquatic facilities experience a "honeymoon period" where large attendances are experienced for the first few years of operation before a settling of demand occurs and results in falling attendances from that point on.

The data for comparative centres above does not support this theory when looking at the individual centres; Aquajetty shows 3 years of increasing growth in its aquatic attendances and TTAC shows continual growth experienced since it re-opened. MAFC shows a steady incline in aquatic attendances for 2 years followed by an approximate drop of 5% each subsequent year. The management advise that membership attendances for the centre have never been apportioned or recorded as aquatic attendances. They also advise that there is an increase in attendances for the increased membership over the last 2 years that corresponds with the recorded falling

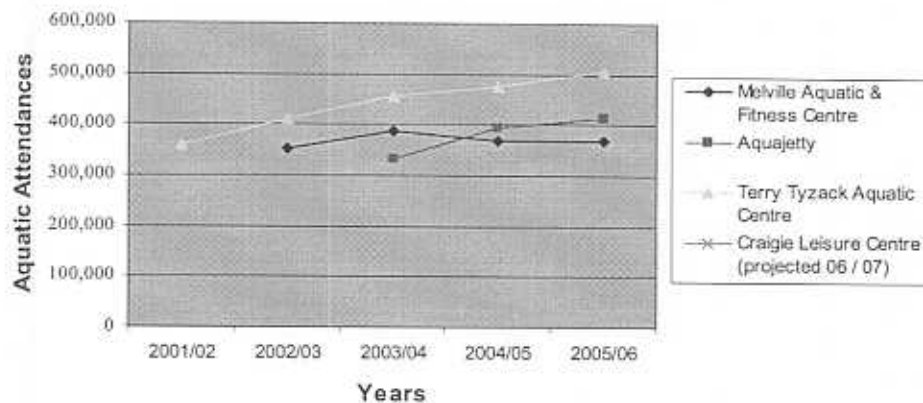


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aquatic attendances. In effect the aquatic attendances are considered to have remained stable over this period.

The graph below shows the annual aquatic attendances for the centres since opening new or redeveloped.

Comparative Centre Attendances since opening / redevelopment



Influences on future attendances will include; the time of expansion and impact of any closure whilst adding facilities, the scale and impact of Aquamotion and Balga Aquatic Centres and the provision of a coastal pool within the City of Stirling. Positive influences will include the continued population growth within the City of Wanneroo, continued increases in physical activity within the community and interesting and innovative programming initiatives.



RECOMMENDATIONS

That the City of Joondalup;

1. Receive the Aquatic Facilities Assessment, City of Joondalup Leisure Centres Craigie, Report.
2. A need for further aquatic facilities currently exists at the Craigie Leisure Centre; the facilities that should be considered for provision are an outdoor 50 metre pool designed for maximum flexibility of use and an outdoor zero depth water playground facility.
3. A detailed feasibility study be conducted to determine the potential facility specifications with accurate cost estimates and projected operational budget.



APPENDICES

Appendix 1. The Craigie Leisure Centre Catchment Map.

Appendix 2. Industry Trends Paper - ABV.

Appendix 3. WA Water polo Facility Submission.

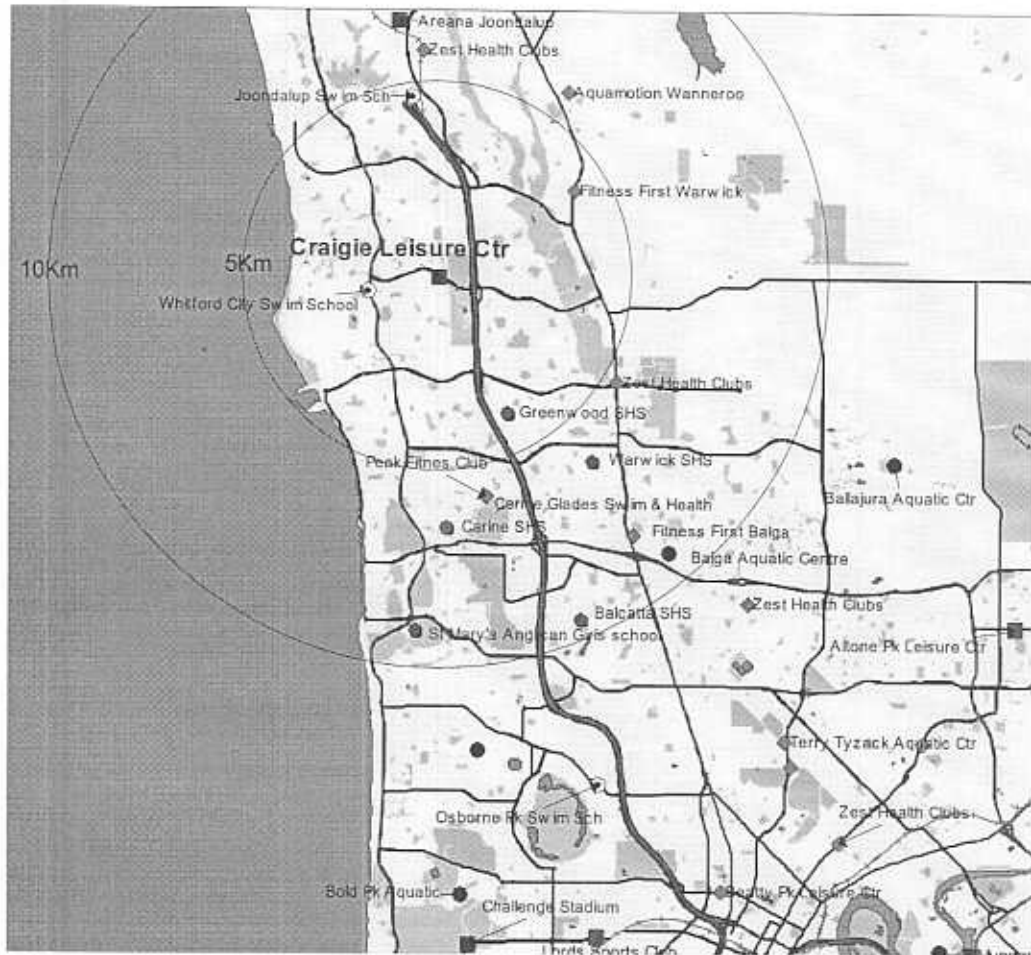
Appendix 4. Order of Magnitude External 50m Pool Cost Estimates.

Appendix 5. Detailed Competitor Analysis.



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Appendix 1. The Craigie Leisure Centre Catchment Map.





Appendix 2. Industry Trends Paper – ABV 2006.

INDUSTRY TRENDS

There are a number of areas in which the leisure industry is affected by trends. The relevant trends for the CLC Aquatic Facilities Needs Study include;

- Societal trends
- Participation in exercise trends
- Facility trends

Societal Trends

There are many trends within our society that impact to some degree on the provision of facilities, programs and services within the Sport and Recreation industry. The current trends are as follows;

- The structure of the labour force is changing, with more women in the workforce. There is also a changing trend that many of these women and indeed the entire workforce are employed in part time and casual employment. There also continues to be a continuing trend in the number of long term unemployed. [1]
- The concept of the five day working week is gradually changing with more people either required to or opting to work a six or seven day week. This results in the provision of Sport and recreation needing to be available at other times and not limited to weekends or evenings. Due to people working longer hours they also have less time for leisure or volunteer work in the community. This means that they may be less willing to volunteer for the extended periods of time as required in their sport. In addition, When people are free from work they prefer to spend time with their families, spend more time at leisure in their homes or that they prefer to participate in activities that are short and sharp and do not require long time commitments.
- The Sport and Recreation Industry is now considered to be a significant part of the Australian economy. \$4.1 billion nationally is spent on selected sports and physical recreation products by Australian households. It employs over 80,000 people and exports are increasing. As a result the industry is required to provide a high and consistent level of service in order to retain customers.[1]
- Greater emphasis is being given to preventative health care, resulting in people being more aware of their nutritional requirements, the need for an active lifestyle and the need to have regular medical checks.
- Australian society has become convenience orientated. People want the flexibility to do things at their convenience.



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- Australia is an ageing community. Many older adults retire earlier, live in their own homes longer, have more accumulated assets and superannuation and travel more extensively than previous generations. As our population continues to age there is a need to provide specific programming for the older adult. The older population is more educated and informed on matters relating to health and well being and as such demand greater resources, services and programs than in the past.
- The average household size is shrinking. ABS census data shows there is an increasing trend in single occupant and couples without children households, whilst there is a declining trend in households with children. The average household size is projected to fall from 2.6 in 2001 to between 2.2 and 2.3 in 2026. This will result in a greater spread of the population and a greater need for socialising options for people.
- Changes to the economic structure of Australian society have had a major impact on many young people. The result is often socially alienated, unemployed young people, for whom traditional recreation opportunities are inappropriate.
- Decrease in the level of physical activity for adults and children and as a result an increase in obesity levels, particularly in children. Refer to the section titled 'participation', which provides the latest figures from the Australian Bureau of Statistics supporting a more sedentary choice of recreational activities.
- The public liability crisis has impacted significantly upon the Sport and Recreation industry. A major impact is the significant increase in the cost of premiums and in some cases, exclusion or the inability of some groups to gain insurance cover.
- There is a declining population in some rural environments. As some of these environments decrease in population this will potentially have an impact upon the sustainability of services and facilities.
- Average household disposable income has risen and this may indicate that more funds are available for spending on leisure, however there is greater competition for the spending of disposable income.[2]
- The Sport and Recreation sector of the workforce is anticipated to experience the 4th largest growth rate of all sectors over the next five years. [2]
- Generation Y are now beginning to make an impact on society as they are now entering the workforce. Generation Y are disloyal to brands, more open to change, technologically sophisticated, confident and optimistic and most influenced by friends and peers.



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- Western Australia's population is expected to grow to 2.9 million by 2031. The major driver of population growth is from overseas migration which will contribute more than interstate migration and natural increase combined. [3]

[1] Trends in Sport and Recreation, Recreation Planning Framework for North West Tasmania, June 2001.

[2] Trends and Implications for Sport and Recreation, Department of Sport and Recreation, December 2003

[3] Western Australia Tomorrow, Planning Western Australia, October 2000

Societal Benefits

The societal benefits of the provision of leisure facilities and services are many and varied. Facilities assist in the building of social capital in many ways, it can provide a meeting place for the community that although lives in the same area, have little opportunity to meet and interact with today's busy lifestyles. This opportunity provides a mechanism for social cohesion and provides common platforms for people in an area who may have little else in common with each other.

Mental and physical well being is also a benefit that is enhanced through provision and use of leisure facilities. The benefits of physical activity are well documented with regards to physical health. Only recently are the benefits of physical activity to mental health gaining exposure. Research has found that with exercise, certain endorphins are released that assist in sleeping, improve mood and give the sense of feeling more energetic. Recent exposure of the benefits of activity for the mental state of depression has been made by the organisation Deep Blue and some of the high profile citizens who have experienced this condition. Activity in a group with others reduces the feeling of isolation, and regular exercise has also been shown to help prevent the development of mental disorders. The financial benefit to the community of a more healthy population is also considerable.

A study commissioned by DSR WA has shown that increased fitness from physical activity has positive effects for children in school. Children are able to concentrate for longer in class and retain more information.

Community cohesion is strengthened when people come together to play sport and get involved in group activities. Sports clubs build strong relationships in the community providing support for people, creating a sense of belonging.

The provision of leisure facilities are also shown to impact positively on youth social issues such as vandalism and other anti-social activities.

The development of the individual is another benefit that leisure facilities provide with the opportunities to test ones abilities, improve skills, experience success and self expression, which can lead to improved self esteem and feelings of confidence and self worth. They can also provide a place for socialising, relaxation and contemplation, all legitimate forms of leisure and re creation.



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Leisure facilities are also large employment generators providing the community with employment opportunities and the resultant financial rewards, which filters back into the community providing more employment and prosperity.

Participation in exercise trends

Despite the latest statistics indicating that participation levels in Sport and Recreation have increased over the last three years, there is still a large proportion of the Australian population who are inactive. The increase in participation is due to the heightened community and individual awareness of the benefits of physical activity.

There is still a large proportion of the Australian population who are active but insufficiently so to gain a health benefit, and as a result the lack of activity remains an issue for Sport and Recreation Providers. According to the Premiers Physical Activity taskforce WA records 13.5% of the population as being inactive, with 47.7% of the population being overweight or obese.

Other trends in relation to the participation of Sport and Recreation, as indicated in the 2006 – 2010 strategic directions for Western Australian Sport and Recreation (SD4) are as follows:

- Parents are becoming increasingly concerned about the safety of tradition play environments of their young children. Parents are increasingly prohibiting their children from playing in the park and walking home from school. As a result, young children have less opportunity for incidental physical activity.
- People of all age groups can now choose from a wide range of Sport and Recreation options. This increased choice of options has led to increased client expectations of Sport and Recreation Service deliverers.
- Consumers expect high quality services, with considerable variety in type and availability. This expectation has invariably led to cost increases. As a result some services have become cost prohibited for some sectors of the community.
- There are substantial demographic and social shifts (e.g. ageing population, rural drift and family makeup) impacting on Sport and Recreation participation. This is reflected in the availability and willingness of players, coaches, spectators and administrators to participate.
- There is an increasing emergence of Industry Standards (both voluntary and legislation based) as a basis for better responding to community expectations in service delivery.



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A paper produced by the Department of Sport and Recreation (Trends and Implications for Sport and Recreation, December 2003) highlights the following trends for participation:

- Most people who do physical activity do so close to their home, therefore the design and perceived safety of neighbourhoods is important for participation in physical activity.
- People are more inclined to be more active if the opportunities are close to home and require minimal effort.

Further trends researched by A Balanced View Leisure Consultancy Services identify other key trends in the participation of Sport and Recreation:

- Increased female participation in the labour market has led to a shift in the programming and planning of services and facilities.
- The soon to be retiring 'Baby Boomers' have knowledge, mobility and high expectations for their leisure activities, impacting on the quality of facility and service provision.
- The decrease in proportion of young children effects the planning of programs and facilities for the future. For example in aquatic facilities, more water space and programming dedicated to adults, with less leisure pool space dedicated to children.
- A shift towards providing educational opportunities within recreation, play, programs and exploration.

[1] Strategic Directions for Western Australian Sport and Recreation, 2003 – 2005, Department of Sport and Recreation

[2] Trends in Sport and Recreation, Recreation Planning Framework for West North Tasmania, June 2001

[3] Trends and Implications for Sport and Recreation, Department of Sport and Recreation, December 2003

[4] A Balanced View (ABV) Leisure Consultancy Services, October 2002.



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Exercise Recreation and Sport Survey [ERASS]

This research is a joint project between the State and Territories Departments of Sport and Recreation and the Australian Sports Commission.

The key findings from this study show the following participation statistics;

The top seven activities for participation in 2005 were reported as;

Activity	Participation	% change 2001-05
Walking	5.97	+ 37.2
Aerobics / fitness	2.96	+50.9
Swimming	2.31	-4.3
Cycling	1.65	+14.5
Tennis	1.25	-9.3
Running	1.23	+13.6
Golf	1.14	-8.1

** Participation figures are expressed in millions*

- Overall participation in exercise, recreation and sport three times per week or more has increased from 37.2% of the population in 2001 to 44.2% in 2005. Despite a slight decline from 2004-2005, 1.5 million more persons participated three times or more per week in physical activity from 2001 to 2005.
- All states and territories of Australia experienced an increase in physical activity participation from 2001 to 2005.
- WA has a slightly higher participation rate than the Australian average, being 0.5 % higher in 2005.
- Organised activity participation rates in WA have increased from 2001 – 2005 with a slight fall in 2002 and 2004. Whilst Australia averages dropped 0.9% in 2005, WA participation increased slightly by 0.3%.

Year	WA	Australia
2001	42.2	39.9
2002	42.0	40.9
2003	44.8	42.8
2004	42.7	42.7
2005	43.0	41.8

Facility Trends

Sport and Recreation facilities continually have to adapt to changing trends within the industry in order to remain a viable option. This in itself is an emerging trend as it becomes more difficult for facilities to operate at an acceptable operational return. Other trends currently affecting facilities are:



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- Use of chlorine is becoming an issue as recent research reported in the media has made links between chlorine and health conditions such as asthma. If the community starts to react against it aquatic centres may have to shift to other more expensive forms of water disinfectant.
- There are increasing demands for improved Sports and Recreational facilities including those that are able to host national and international events.
- Joint provision and shared use of facilities continue to remain an important and necessary aspect for facility development and viability.
- The need for the development of partnerships between facilities and community groups to increase the level of informal and low cost participation opportunities.
- Future funding for facilities via the Community Sport and Recreation Facilities Fund (CSRFF), will need to be based on comprehensive planning to ensure that there is not an oversupply of infrastructure.
- Local and regional infrastructure planning is improving across regional Western Australia with Local Governments collaborating more often on facility needs and outcomes.
- Community needs are constantly changing resulting in the requirement of more flexible facility design.
- There is a range of urban planning and design trends specific to Western Australia, for example the linear development along the coast of metropolitan Perth, high/medium density urban infill, ongoing suburban sprawl and higher density redevelopment in older suburbs. Creative and innovative leisure recreation planning across multiple stakeholders is required.
- Increasing numbers of Local Government Sport and Recreation/Leisure Centres are incurring substantial operational deficits. This is occurring at a time when Local Governments are trying to respond to increased community demands for a broader range of unstructured participation opportunities.[1]
- Commercialization of Sport and Recreation is occurring. However, commercial facilities require a reasonable population base to be financially viable which may not exist in rural areas.[2]
- Participants have an expectation that recreation facilities will be developed and equipped to a reasonably high quality.
- Optimum use of facilities is necessary to cover increased capital costs and scarce resources.
- The community has a much greater appreciation of their legal rights and responsibilities in relation to the provision of leisure facilities and programs.
- Accidents will always occur in recreation and sporting facilities. There is now a greater appreciation of the need for risk management strategies to improve safety.
- There is an increased move towards the privatisation of facilities.
- Australia has the highest incidence of skin cancer in the world with skin cancer being the most common form of cancer in Australia [4]. Leisure providers have a responsibility to provide services and facilities that support this health concern.



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- Increased community demand for learn to swim programs through deaths/drowning.
- Reached a plateau of new facilities. Minimal new facilities have been built over recent years. There is an emphasis on the refurbishment of existing facilities.
- Many facilities are now focusing on the senior market in regards to programming health and fitness opportunities.
- Facilities continue to provide packaged products, for example the Les Mills Program. As these are standard programs which the customers are familiar with.
- There is a trend for Local Government facilities to program and implement personal training programming, following the private sector lead.
- There are unrealistic expectations of facilities in terms of operational return.
- Within aquatic facilities pool supervision levels may need to be dramatically increased due to recent drownings. This may be forced on facilities via legislation.
- Facilities may become more fitness orientated due to financial return.
- Facilities are now seeing more of a bottom line emphasis.
- There is continuing to be a shortage of qualified staff to operate these facilities.
- Many facilities are currently looking at reviewing staffing costs, awards and penalties due to increased allowance for casual staff and the traditional pay rates.
- Facility design investigating opportunities for fewer staff through better design, and new features that require less staffing
- Local Governments trying to be all things to all people is not viable, unique facilities must be provided to draw the maximum utilisation and draw attendances from further than local areas.
- Facilities are aimed at further maximizing multi-use of facilities to appeal to the widest audience.
- Leisure facilities need to be entertainment venues.
- Increasing facility provision is diluting the population per facility. The example of Local Government Authority [LGA] aquatic centres in WA shows that in 2000 there was an LGA aquatic centre for every 16,239 people whilst in 2004 it was 16,000. [5]
- Falling financial returns are being experienced for all categories of aquatic centres, with recent CERM research showing an 8% reduction in expense recovery from 1993 to 2003.

[1] Strategic Directions for Western Australian Sport and Recreation, 2003 – 2005, department of Sport and Recreation

[2] Sport and Recreation Trends, A Balanced View (ABV), Leisure Consultancy Services, October 2002.

[3] Trends in Sport and Recreation, Recreation Planning Framework for West North Tasmania, June 2001

[4] Trends for Sport and Recreation, Department of Sport and Recreation, December 2003.

[5] ABV Leisure Consultancy Services research 2005/6



Trend Considerations

Recent trends in the provision of leisure centres have reflected people's need for choice, high quality and maximum user comfort and experience. Almost exclusively, centre redevelopments have revolved around modernising facilities to suit the needs of the particular community it serves and to allow the facility to be competitive with neighbouring or competing facilities.

The addition, refurbishment and increasing of capacity of income producing features such as health clubs multipurpose areas, highly flexible, programmable water spaces, group fitness and soft play features has also occurred. These features are generally selected on the degree of complimentary services they provide to existing facilities and their ability to assist in the cost recovery and reduction of operating deficits, dependant on capital budgets available.

Recognising the differing needs of users has been featuring prominently in new and refurbished facilities with the example of separate bodies of water heated to different temperatures a focus. Pools such as hydrotherapy, warm water program pools and cooler lap pools all purpose designed are examples of such development trends.

Staging of redevelopments is also occurring and provides Councils the opportunity to provide facilities as they can be afforded and when more user details are known. (This is particularly the case with Greenfield sites). In theory this approach allows quality to be built into the facilities by not placing pressure to build a facility with all the desired features at once. The predetermined features can be built well and when appropriate and can be afforded, the further stages can be added (This strategy has been undermined somewhat in recent times within WA due to spiralling cost escalations in the building trade).

A trend in design is to build facilities with as many different features as possible so as to appeal to the widest possible audience. This approach aims to maximise the facility's ability to generate income, and share fixed costs over a number of income producing features. The facility also allows complete families to utilise the one facility for a number of their leisure needs.

Design of facilities should not only be considerate of the users needs but also the operators in terms of easy, safe and economical operations. This is achieved at design stage via management input to influence design that will minimise staffing requirements and via energy consultants for consideration of alternate sources of energy for heating and cooling.

These trends should all be considered within the design of any facilities at the CLC.



Appendix 3. WA Water polo Facility Submission



Craigie Leisure Centre Requirements

January 2007

In the northern metropolitan corridor of Perth there are currently no public facilities for water polo between Challenge Stadium in Mt. Claremont and Arena Joondalup in Joondalup. WA Water Polo is very interested in working with the City of Joondalup to develop further facilities for water polo. The redevelopment of Craigie Leisure Centre with the potential development of a 50m pool provides an ideal opportunity for the sport.

Realistic Requirements for A Grade/National League and Senior Water Polo

The depth of the current facilities at Craigie Leisure Centre doesn't allow senior water polo to be played. The realistic requirements to allow water polo including A Grade, National League and flippa ball (modified water polo) matches to be held at Craigie Leisure Centre would be:

Field of Play: 25mx20m

Depth: 1.8m for 25m

Water Temperature: 26 degrees

Light intensity: not less than 600 lux

Consideration could be given for the 50m pool to be built 25m wide. This would allow "across pool" set-up so two games or coaching of flippa ball could be conducted simultaneously with up to 52 children in the deep water. This set up would permit swimmers to swim in the shallow part of the pool and other aquatic sports that require deep water including water polo, diving, under water diving could also use the pool at the same time.

Requirements in the "Ideal World" or FINA Olympic or World Championship Standard

The FINA Olympic or World Championship Standard Water Polo rules state:

Field of Play:

Men's – "distance between the goal lines shall be not less than 20m and not more than 30m" Women's – "distance between the goal lines not less than 20m and not more than 25m"

Width: "not less than 10m and not more than 20m"

Depth: "nowhere less than 1.8m, preferably 2.0m"



Water Temperature: "26 degrees"

Light intensity: "not less than 1500 lux" (*FINA Handbook 2005-2009*)

Projected Usage

Water polo in Western Australia is a small but growing sport with nearly 3,800 members and 15 clubs (9 metropolitan and 6 regional clubs). The growth of the sport is restricted by appropriate aquatic facilities.

WA Water Polo has identified as a key objective "to grow the participation and interest in water polo by 5% per annum through a range of strong development programs". The association's strategic priorities include "facilitating the development of a competition water polo pool at an aquatic facility in the northern metropolitan corridor" and "identifying potential pools and facilitate coaching programs to encourage the development of new A Grade clubs" (*Planning for the Future of Water Polo in Western Australia, Strategic Plan July 2006-June 2009*).

WA Water Polo has initiated and supported a small junior coaching program at Arena Joondalup with the view that over time this will grow and a club formed. The association would support a similar program at Craigie Leisure Centre initially providing equipment (including goals), coaches and promotional support for assist the development of a new club.

Craigie Leisure Centre is ideally situated near St Marks, Padbury Senior High School and seven primary schools including Craigie, Camberwarra, Bambara, Padbury, South Padbury, Hillarys and Springfield Primary School. WA Water Polo would market the new junior water polo programs at Craigie Leisure Centre to these feeder schools.

Realistically, a metropolitan club could range from a large club of 450 members to a smaller club of 100 members based on current registrations.

Projected Payment

Currently, clubs each pay varying pool hire and pool entry which is dependent their arrangement with their local council. Fees based on the average figures paid by the clubs would be approximately \$20-25 per hour for pool hire and approximate entry fees of \$2.80 for participants. These figures, however, are only a guide.



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Appendix 4. Order of Magnitude External 50m Pool Cost Estimates.

(Separate PDF File)

Appendix 5. Detailed Competitor Analysis

Competitor Analysis – Craigie Leisure Centre

A review of Craigie Leisure Centres competitors has been undertaken to define the key business units of the various competitors. A summary of key prices, facilities, programs and services has been detailed with an overall summary on how the competitor impacts on potential and current Craigie Leisure Centre customers. A 'Summary of Business' is detailed after each competitor to outline the key strengths and potential market advantages the competitor may have over Craigie Leisure Centre. The review on competitors was limited to aquatic facilities that catered for the leisure, learn to swim and lap swimming markets in the northern corridor of the Perth metropolitan area.

A regional review of leisure facilities shows that a large area south of the Craigie Leisure Centre is void of aquatic leisure facilities. This area is bounded by the Balga Aquatic Centre (new indoor aquatic centre under construction), Bold Park (outdoor only) Terry Tyzack Aquatic Centre, and Challenge Stadium.

Craigie Leisure Centre is situated at the northern end of this area, therefore draws the market directly south almost exclusively in its primary catchment zone (5-8kms). The major competitor outlined in the review is the Arena Joondalup due primarily to its close proximity, similar range of facilities, programs and services. There are also competitors that compete in the specialist market segment of Learn to Swim with the Craigie Leisure Centre.



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Facility	50 Metre Pool	25 Metre Pool	Leisure Pool	Hydro Pool	Spa	Sauna/Steam	Water Slide
Craigie Leisure Centre		✓	✓		✓	✓	
Aquamotion		✓	✓	To be constructed	✓	✓	To be constructed
Arena Joondalup	✓	✓	✓		✓	✓	✓
Beatty Park	✓	✓	✓		✓	✓	✓
Bold Park	✓		✓				
Balga Aquatic Centre (under construction presently)		✓	✓	✓			
Challenge Stadium	✓	✓			✓	✓	
Terry Tyzack Aquatic Centre	✓	✓	✓		✓	✓	



**A Balanced View (ABV)
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Facility	50 Metre Pool	25 Metre Pool	Leisure Pool	Hydro Pool	Spa	Sauna/Steam	Water Slide
Carine Glades Swim & Health		✓					
Fitness First		✓			✓		
Greenwood Senior High School		✓					
Carine Senior High School		✓					
State Swim - Joondalup & Hillarys		✓					
St Mary's Anglican School for Girls	✓						
Warwick Senior High School		✓					
Zest Fitness Joondalup/Madeley		✓			✓	✓	



COMPETITOR ANALYSIS FOR CRAIGIE LEISURE CENTRE		
Competitor	Location	Price
Joondalup Arena	Joondalup 7km Kennedy Drive Joondalup	<p><u>Aquatic Entry</u></p> <ul style="list-style-type: none"> Adult Swim \$4.50 10 pass \$40 20 pass \$78.00 40 pass \$150.00 Child Swim \$3.20 10 pass \$27.50 20 pass \$51.00 40 pass \$98.00 Concession Swim \$3.40 10 pass \$29.50 20 pass \$56.50 40 pass \$110.00 Swim, sauna and / or steam \$6.70 Family \$11.30 <u>Learn to Swim</u> Pre-school \$110 (10 week term) School Age \$120 (10 week term) Adult \$120 (10 week term) <u>Aqua-Aerobics</u> Casual Adult - \$7.70 Concession \$6.60
		<p>Facilities / Programs / Services</p> <p>Facilities</p> <ul style="list-style-type: none"> 50m pool 25m adventure-learn to swim pool Waterslide Lazy River Spa Sauna Steam room Crèche Disabled change rooms Gymnasium Aerobics studio Spinning studio Multi-purpose sports courts <p>Programs</p> <ul style="list-style-type: none"> Learn to Swim Aqua - Aerobics School Carnivals Pool Parties <p>Services</p> <ul style="list-style-type: none"> Concession swim tickets LTS discounts for families



Summary of Business

The Joondalup Arena is Craigie Leisure Centre's main competitor. Located 7kms away the indoor aquatic facilities of the Arena directly competes with CLC in the lap swimming, learn to swim, squads, schools and leisure market.

The key strengths of the Arena's indoor aquatics design is similar to CLC in that it can accommodate various user groups and programs at the same time by having separate bodies of water. The separate bodies of water also allows the temperatures of each pool to be set in accordance with the predominant activities conducted in those areas. The design of the adventure pool features a beach entry, dedicated learn to swim area, play features, lazy river and water slides. The adventure pool also features a twenty-five metre three lane pool developed especially for the learn to swim and aqua-aerobic markets. A feature for customers of the Learn to Swim program is the family discounts that apply when two or more family members enrol into the program.

The 50m pool has attracted a strong base of squad and lap swimmers and the pool's lower temperature suits the lap swimming market. The casual lap swimmer is less inclined to swim in a cool 50m pool, particularly over the winter months. The 50m pool facility attracts the competitive swim market and serious lap swimmers, consistent with the initial design intent for Arena - to be a sub elite level facility for Perth's northern suburbs. The ability to hold W/A Swimming sanctioned events has reduced markedly with FINA requirements now requiring 10 lane facilities to be utilised.

Arena prices are fractionally higher than Craigie Leisure Centre for adult casual entry and multi-passes and approximately 5% cheaper for children and families. The combination of superior interactive aquatic facilities and lower children's prices makes the Arena very competitive with CLC for families looking for a recreational aquatic venue. Arena's learn to swim packages are 12-15% more expensive than Craigie Leisure Centre.

Since the opening of the aquatic facilities the Arena has had an image of an elite competition and training venue. Management has attempted to change this perception with communication strategies over recent years. This message would have been enhanced with the extended closure of the CLC during renovations. Whilst Arena is seven kilometres from Craigie Leisure Centre the two Centres share catchment suburbs north of CLC.



A Balanced View (ABV)
Leisure Consultancy Services

In summary Craigie Leisure Centre is competing with a multi-purpose, well-designed facility that can cater for all aspects of the community's leisure and aquatic needs. The Arena is priced above Craigie Leisure Centre for learn to swim packages, but cheaper for children and family's casual entries. The facility's location and mix of facilities makes it CLC's major competitor.

COMPETITOR ANALYSIS FOR CRAIGIE LEISURE CENTRE

Competitor	Location	Price	Facilities / Programs / Services
State Swim	1. Hillarys - 2km Cur Marmon & Banks Avenue Hillarys. 2. Joondalup - 6kms 6 Buick Way, Joondalup.	<u>Aquatic Entry</u> Public Lap Swimming Mon - Fri 6 - 8.30am, 12 - 2.00pm, Sat 7 - 8.30am Adult \$ 5.50 15 pass \$63.00 (seniors -20%) 30 pass \$111.00 (seniors -20%) Unlimited/month pass \$57.75 Senior \$4.40 Child \$3.50 <u>Learn to Swim</u> Water babies \$11.75 Preschool \$14.00 School Age \$14.00 Adult \$14.00 Squads \$14.00	<u>Facilities</u> 25m indoor pool Heated change rooms <u>Programs</u> Learn to swim Squads Teenage learn to swim Swim for Fitness Evening swimming lessons <u>Services</u> Pay as you go option Frequent swimmer card



Summary of Business

State Swim is national franchises of learn to swim programs operated from private swimming facilities. The State Swim program offers a full range of learn to swim programs from infants through to squads and adults. State Swim Joondalup and State Swim Whitfords City are direct competitors of Craigie Leisure Centre in the learn to swim market, being situated only minutes away from the Centre and each other. State Swim appears to be recognised by the community as a reputable provider of swimming lessons, developed in part by strong corporate marketing initiatives conducted at all Centres (including Television). State Swim provide a structured program, offered in thirty-two degree water year round with a weekly or monthly payment option (ie non term based). Families with two or more children enrolled are offered discounts, with further discounts being offered for advanced payments.

State Swim provides public swimming Monday to Friday from 6am – 8.30am and 12pm – 2pm and on Saturday from 7am – 8.30am. Casual entry or concession tickets are available for regular swimmers.

Whilst the Centre provides what is considered to be ideal water temperatures for learn to swim lessons, the facilities presentation, internal humidity and perceived (visual evidence only) lower water quality detract from the programs overall experience. The twenty-five metre pool shallow depth limits the flexibility and range of programs offered at the Centre, but highlights the single purpose nature of the business. The Centre does not provide lifeguard supervision to the public during lap swimming sessions. Craigie Leisure Centre crèche provides a competitive advantage over State Swim by allowing parents with young children to participate in a class whilst the other children are cared for in the crèche.

State Swim is priced significantly above all of Craigie Leisure Centre's learn to swim, squad and adult programs. State Swim Joondalup has advised that learn to swim enrolment figures have remained steady over the last five years.

State Swim is a direct competitor of Craigie Leisure Centres learns to swim program, with their competitive advantage being their recognised brand in the community.



A Balanced View (ABV)
Leisure Consultancy Services

COMPETITOR ANALYSIS FOR CRAIGIE LEISURE CENTRE

Competitor	Location	Key Prices Summary	Facilities / Programs / Services
Aquamotion	Wanneroo – 6km Civic Drive Wanneroo	<ul style="list-style-type: none"> <u>Aquatic Entry</u> <ul style="list-style-type: none"> Adult \$3.50 10 pass \$31.50 Child \$2.20 10 pass \$19.80 <u>Learn to Swim</u> <ul style="list-style-type: none"> Parent & Child \$70.00 term Preschool \$90.00 per term School Age \$90.00 per term Adult \$90.00 per term Squads \$2.20 entry only <u>Aqua – Aerobics</u> <ul style="list-style-type: none"> Casual \$5.50 	<ul style="list-style-type: none"> <u>Facilities</u> <ul style="list-style-type: none"> 8 lane 25m/adventure indoor pool Spa Sauna Steam room Disabled change rooms Gymnasium Aerobics studio Crèche <u>Programs</u> <ul style="list-style-type: none"> Learn to swim Squads Aqua-aerobics Birthday parties <u>Services</u> <ul style="list-style-type: none"> Individual and total memberships Off peak memberships Concession cards



Summary of Business

Currently, Aquamotion would not be considered a major competitor of Craigie Leisure Centre, even though it provides similar facilities, programs and potentially shares catchments suburbs of Pearsall, Wanneroo and Hocking due to their location between the two centres. Aquamotion is a small multi-purpose recreation facility offering standard programs including learn to swim, aerobics, aqua aerobics and general lap swimming. Aqua-motion facilities are showing signs of its age yet has been designed to accommodate for the family swimming market. Aquamotion has two bodies of water, which are both heated to twenty-seven degrees. One pool is designed as a six lane twenty-five metre pool and the other is a small family/adventure pool.

Aqua-motion is priced very competitively with all prices cheaper than Craigie Leisure Centre. Aquamotion offers a broad range of casual entry, concession tickets and membership packages. Premium membership packages allow access to all facilities at the Centre and are priced below Craigie Leisure Centre.

The City of Wanneroo has planned for a thirteen million dollar refurbishment and upgrade of Aquamotion some time in 2007 that will include the addition of a hydro-therapy pool, an outdoor water playground and a bombly / diving pool. The hydrotherapy pool, which will include ramp access, will give Aquamotion an advantage in attracting seniors, people with injuries and the infant learn to swim market. The construction time frame is estimated at 54 weeks, with full closure of the facility during this time still being considered.

Currently Aquamotion does not have any key characteristics that give it a competitive edge in the surrounding market and would only attract customers over Craigie Leisure Centre in the shared catchment areas on price and convenience of location. However, with the planned multi-million dollar refurbishment/upgrade it will become a more significant competitor of Craigie Leisure Centre in the future. The 6km distance between the centres is deceptive as there are a number of barriers between the centres that interrupt traditional catchment areas; lake Joondalup, Wanneroo Road and the Mitchell Freeway.



A Balanced View (ABV)
Leisure Consultancy Services

COMPETITOR ANALYSIS FOR CRAIGIE LEISURE CENTRE

Competitor	Location	Key Prices Summary	Facilities / Programs / Services
Terry Tyzack Aquatic Centre	Inglewood – 15km Alexander Drive Inglewood	<p>Aquatic Entry</p> <ul style="list-style-type: none"> Adult \$4.10 10 pass \$36.90 20 pass \$69.80 40 pass \$135.20 Concession \$3.10 10 pass \$27.90 20 pass \$52.40 40 pass \$102.40 Child \$3.00 10 pass \$27.00 20 pass \$51.00 40 pass \$99.20 Family Swim \$12.50 <p>Learn to Swim</p> <ul style="list-style-type: none"> Pre-school \$100 (10 weeks) School age \$110 Adults \$115 Senior Squads \$3.10 entry only <p>Aqua – Aerobics</p> <ul style="list-style-type: none"> Casual \$10.00 	<p>Facilities</p> <ul style="list-style-type: none"> 8 lane 25m Adventure indoor pool Outdoor 50m pool Spa Sauna Steam room Family Change rooms Gymnasium Aerobics studio Crèche <p>Programs</p> <ul style="list-style-type: none"> Learn to swim Squads Aqua-aerobics Birthday parties Carnivals Intern Swimming Bronze Medallion Pool Life Guard Certificate <p>Services</p> <ul style="list-style-type: none"> Family LTS discounts Concession cards



**A Balanced View (ABV)
Leisure Consultancy Services**

Summary of Business

Whilst the geographical location of the Terry Tyzack Aquatic Centre from Craigie Leisure Centre would typically mean the Centres are not considered competitors, the fact that no similar facilities exist in the south eastern corridor between the two Centres changes this scenario. Potential customers located approximately 5kms North West of Inglewood and 5kms South of CLC seeking multipurpose aquatic facilities would consider the options available at both Centres.

The Terry Tyzack Aquatic Centre is a recently redeveloped multipurpose recreation centre comprising of both indoor and outdoor facilities. The centre has four separate pools designed particularly to accommodate for specific user groups including learn to swim, seniors, lap swimmers and the family market. The indoor adventure pool is heated to 32 degrees, the eight lane twenty-five metre pool is heated to 30 degrees and the outdoor fifty-metre pool (and diving pool) is heated to 27 degrees. This presents a significant advantage over CLC providing the customer with a choice of pool temperatures and indoor / outdoor options. The facilities disinfection system also uses ultra-violet technology.

The Centre's prices for adult's and children's casual entry and multi passes are on average 10% lower than CLC, however the family pass is \$0.50 more expensive. The Centre's Learn to Swim program is also 5 – 10% more expensive than CLC for all ages. The Centre leases out lanes for squad coaching charging squad members a special entry price of \$3.10.

The Terry Tyzack Aquatic Centre offers a modern facility that is competitively priced, with a broad range of programs. The Centre has provides four bodies of water providing programming flexibility for management and a variety of choice for the customer. The impact of Terry Tyzack Aquatic Centre on CLC is estimated as being limited.



A Balanced View (ABV)
Leisure Consultancy Services

COMPETITOR ANALYSIS FOR CRAIGIE LEISURE CENTRE			
Competitor	Location	Key Prices Summary	Facilities / Programs / Services
Zest Health & Fitness	1. Madeley – 5 kms Kingsway Shopping Centre Cnr Wanneroo & Hepburn Ave Madeley 2. Joondalup – 6 kms Cnr Boas Ave & Lakeside Drive Joondalup	<u>Learn To Swim</u> <ul style="list-style-type: none"> Children – Adults \$11.00 per lesson Squads \$10.45 	<u>Facilities</u> <ul style="list-style-type: none"> 25m pool Spa Sauna Gymnasium Aerobics studio Crèche <u>Programs</u> <ul style="list-style-type: none"> Aqua-aerobics Learn to swim Squad swimming <u>Services</u> Inter-facility Memberships



Summary of Business

Zest Health and Fitness is a national health club chain that has bought out the previous owners of BC the Body Club. The review was undertaken of two facilities located in Madeley and Joondalup with both facilities having very similar facilities and equipment.

The facilities at both Zest Health and Fitness are reasonably new and present well. The gymnasium and aerobics studio are both large and well equipped with a pool, spa and sauna completing the facilities that are included as part of all memberships. Zest Health and Fitness provides crèche and one personal training session as part of all memberships. Memberships are structured to accommodate for use of all facilities and can be divided into three, six and twelve months. The core business of Zest Health and Fitness is personal training.

The two Zest Health and Fitness facilities provide a twenty five metre pool, spa and sauna, which are used as a key promotional tools for increasing the perceived value to the memberships offered. Both the Madeley and Joondalup facilities offer learn to swim classes for a flat fee of \$11.00 per lesson, being 5-10% more expensive than Craigie. The casual session fee for aqua-aerobics is almost 40% more expensive than Craigie at \$15.00 per session. The aquatic facilities are small and have a high level of humidity (at visits), with a perceived lower standard of water quality as compared with Craigie Leisure Centre (based on visual observations). In addition the aquatic areas are not supervised by any staff, and no staff at the Centre are currently required to have any formal lifesaving qualifications (as they do not fall under the Public Health requirements as a private club operation).

Zest Health and Fitness directly competes with Craigie Leisure Centre in the health and fitness and learn to swim market. Craigie's competitive advantage over Zest Health and Fitness are the service, supervision and range of facilities available at lower prices. These facilities would appeal to learn to swim participants (parents) that live within close proximity to these centres.



A Balanced View (ABV)
Leisure Consultancy Services

COMPETITOR ANALYSIS FOR CRAIGIE LEISURE CENTRE

Competitor	Location	Key Prices Summary	Facilities / Programs / Services
Bold Park Aquatic	Florcut – 15kms The Boulevard Florcut	<p><u>Aquatic Entry</u></p> <ul style="list-style-type: none"> ▪ Adult \$3.90 ▪ 10 pass \$37.00 ▪ Student Concession \$3.40 ▪ 10 pass \$31.00 ▪ Child \$2.80 ▪ 10 pass \$25.00 ▪ Family pass \$11.00 <p><u>Learn to Swim</u> (per class - payable by the term)</p> <ul style="list-style-type: none"> ▪ Parent & Child \$9.50 ▪ Preschool \$9.50 ▪ School Age \$10.00 - 11.00 ▪ Squads \$3.40 entry only <p><u>Aqua – Aerobics</u></p> <ul style="list-style-type: none"> ▪ Casual \$7.00, \$65.00 for 10. 	<p><u>Facilities</u></p> <ul style="list-style-type: none"> ▪ 8 lane 50m outdoor lap and leisure pool ▪ Disabled change rooms and hydraulic pool chair ▪ Crèche ▪ Beach volleyball ▪ Picnic area ▪ Locker hire ▪ Swim shop <p><u>Community room Programs</u></p> <ul style="list-style-type: none"> ▪ Learn to swim ▪ Squads ▪ Aqua-aerobics ▪ Body Harmonics ▪ Birthday parties <p><u>Services</u></p> <ul style="list-style-type: none"> ▪ Individual and multi pass memberships ▪ Swim Shop



A Balanced View (ABV) Leisure Consultancy Services

Summary of Business

Bold Park would not be considered a major competitor Craigie Leisure Centre as it is located 15kms to the South. Bold Park is a medium sized outdoor only aquatic facility offering standard programs including Learn to Swim, Aerobics, Aqua aerobics and general lap swimming. Bold Park's facilities are well maintained and aesthetically pleasing with shade sails and grassed areas coupled with a very high water quality. The centre has two bodies of water which include an eight lane 50 metre pool designed primarily for lap swimming and is heated to twenty-seven degrees all year. The other is a children's undercover wading pool.

Bold Park is priced very competitively with all prices less expensive than CLC and nearby Challenge Stadium. Bold Park is a casual entry facility with only 10 pass packages available. The facility caters for lap swimmers who specifically enjoy 50m outdoor pools. It is reported that the attendances at the centre have significantly increased since the heating of the water.

Bold Park has a large share of the market in its catchment area due to the competitive pricing strategy it employs and its "community" feel.

This facility is planned to receive a major redevelopment within the next 5 years. Plans have been developed that show indoor pool options and a large health and well being suite with gymnasium. These plans have been developed for over 3 years and the redevelopment is dependant on the proceeds of the sale of the Perry Lakes site by the Town of Cambridge.

The area of potential competition for market share with CLC is the lap swimming market which prefer 50m outdoor pools and this will apply to the market share located somewhere within the shared 5km area between both centres.



A Balanced View (ABV)
Leisure Consultancy Services

COMPETITOR ANALYSIS FOR CRAIGIE LEISURE CENTRE

Competitor	Location	Key Prices Summary	Facilities / Programs / Services
Beatty Park Leisure Centre	North Perth – 17kms Vincent Rd North Perth	<ul style="list-style-type: none"> ▪ <u>Aquatic Entry</u> ▪ Adult \$4.00 ▪ 10 pass \$35.20, 20 pass \$65.60 ▪ Child / student \$2.80 ▪ 10 pass \$24.65, 20 pass \$45.90 ▪ Family pass \$11.80 ▪ <u>Learn to Swim</u> ▪ Children: 1 session/week ▪ 1st student per family \$99.00 ▪ 2nd student per family \$90.00 ▪ 3 or more per family \$90.00 for each student ▪ Squad \$108.00 ▪ Children: 2 session/week \$175.50 ▪ Squad: 2 session/week \$205.20 ▪ Adult: 1 session/week \$108.00 ▪ Adult: 2 session/week \$205.20 ▪ Adult Multicultural \$ 76.50 ▪ <u>Aqua-aerobics</u> ▪ Adult \$7.50 ▪ 10 pass \$66.00 	<ul style="list-style-type: none"> ▪ <u>Facilities</u> ▪ 8 lane 50m pool – 25m indoor ▪ Adventure indoor pool ▪ Outdoor 50m pool ▪ Spa, Sauna, Steam room ▪ Water slides ▪ Family Change rooms ▪ Gymnasium ▪ Aerobics studio ▪ Crèche ▪ Café ▪ Meeting / activity rooms ▪ Sports shop ▪ <u>Programs</u> ▪ Learn to swim ▪ Squads ▪ Aqua-aerobics ▪ Birthday parties ▪ Carnivals ▪ <u>Services</u> ▪ Lockers ▪ Individual and combination memberships ▪ Multi entry discounts



Summary of Business

Beatty Park is a historic swimming icon since being the venue for swimming events in the Commonwealth Games in Perth 1962. It delivers quality aquatic facilities that are close to the city with strong brand recognition. Beatty Park is not a strong competitor of Craigie due to its location 17kms to the south in North Perth. Beatty Park's aquatic facilities are ageing particularly the outdoor pool and surrounds. A project management committee has been formed to oversee the potential redevelopment of the facility. The preliminary plans include upgrades to aquatic facilities and plant as well as a number of dry program components.

The key strengths of the centre are the number of aquatic facilities available. The outdoor 50m pool and diving pool are heated and an indoor swimming pool plus spa, sauna and steam room are provided. A feature that is a major attraction from a large catchment area is the indoor leisure pool with children's jungle tree theme. This area has numerous small areas separated with "rocks, trees" and slides. The indoor heated lap pool and leisure pool have been developed to deliver a wide range of learn to swim programs and aqua aerobic options. Learn to swim classes are conducted weekly for approximately 2,000 participants.

Beatty Park has provided classroom space for the many learn to dive companies that operate out of the centre. The 'learn to dive' market is a growing market that mostly utilises the diving pool for its depth. The central location of Beatty Park is an attraction for travellers and tourists accommodated within the City precinct.

The pricing of all aquatic entry is 10% cheaper than Craigie Leisure Centre. The swim, spa, sauna and steam room admission is very low at \$8.00. The regular lap swimmers have 10 pass and 20 pass deals available and the recreational user has a wide range of multi use passes. (a criticism of the pricing is that there are too many variations).

In summary Beatty Park Leisure Centre is a well known brand with a wide range of year round aquatic facilities that cater to all aspects of the local community and City workers leisure needs. The centre is priced below CLC across casual entries, however, due to its distance from CLC is not considered a strong competitor.



A Balanced View (ABV)
Leisure Consultancy Services

COMPETITOR ANALYSIS – CHALLENGE STADIUM

Competitor	Location	Price	Facilities / Programs / Services
Challenge Stadium	Mt Claremont – Stephenson Avenue	<p><u>Aquatic Entry</u></p> <ul style="list-style-type: none"> Adult 16+ \$4.50 10 pass \$40 20 pass \$78.00 40 pass \$150.00 Child U/4 free Child 4-15yrs \$3.40 Student/Concession \$3.40 Concession 10 pass \$29.50 Concession 20 pass \$57.00 Concession 40 pass \$110.00 <p><u>Squad Entry</u></p> <ul style="list-style-type: none"> Registered Club entry 10 squad \$24.20 25 squad \$ 60.50 <p><u>Learn to Swim</u></p> <ul style="list-style-type: none"> Children 9 weeks. Discounts apply for families and 2nd lessons. Toddler \$126.00 Level 1-2 \$126.00 Level 3-7 \$108.00 Squads \$103.00 <p><u>Aqua Aerobics</u></p> <ul style="list-style-type: none"> Adult \$7.00 	<p><u>Facilities</u></p> <ul style="list-style-type: none"> 8 lane 50 metre pool indoor Diving water polo pool indoor 2 x 50 metre pool outdoor Water polo pool outdoor Gym Group fitness studio Pilates studio Function rooms Meeting rooms Multi-purpose sports courts Crèche <p><u>Programs</u></p> <ul style="list-style-type: none"> Learn to swim – parent / baby Learn to swim – pre-school Squads Teenage learn to swim Swim for Fitness Adult evening swimming lessons Group fitness – Les mills Personal training Pilates/Yoga <p><u>Services</u></p> <ul style="list-style-type: none"> Function catering Kiosk Swim Shop <p><u>Complimentary Services</u></p> <ul style="list-style-type: none"> WA Institute of Sport Lifecare Challenge Teamwork Development Training Leisure Institute of WA



Summary of Business

Challenge Stadium opened in 1986 as a venue specifically designed for the development of elite athletes in Western Australia. Challenge Stadium is owned and operated by the State Government under the WA Sports Centre Trust. Over the years and through increased pressure to minimise the operational deficit of Challenge Stadium, management has focussed the business on providing a mix of community, elite sport, function and special events. Although it is located 17 kms to the South of CLC, Challenge Stadium does draw a small number of customers from Craigie's catchment area in the lap swimming market. Whilst the Centre is operationally trying to focus on broader markets the centre still operates within the confines of a facility that was designed for elite sport, which is evident in elements of centre such as car park design, no clear internal transparency between facilities, swimming pool water depths and swimming water temperatures.

Whilst Challenge stadium is making a dedicated emphasis to increase community participation it does not provide aquatic leisure facilities and as such struggles to attract the family market to the Centre. Without the leisure facilities and warm water, Challenge Stadium is not a strong competitor for Craigie Leisure Centre's swim school or family market.

The aquatic facilities that are provided at Challenge Stadium are ideal for the lap swimming, squad swimming and school carnival markets. Challenge stadium offers over 26 lap-swimming lanes with water heated to 27 degrees year round. With such an amount of swimming lanes available Challenge stadium can offer a diverse range of swimming squad programs from a variety of coaches. Currently a number of different swim squads operate out of Challenge Stadium, which helps provide some consistency to swim attendances year round. With such a large range of swimming facilities the lap-swimming customer has a greater opportunity to access lap swimming lanes as compared to Craigie Leisure Centre, which must alternate use between lap swimmers, squads and bookings (however large scale events prevent access at certain times of the year).

In terms of price Challenge Stadium generally is slightly more expensive than CLC. A casual swim priced at \$4.50 places Challenge Stadium as one of the highest pool entry in the state along with the other WA Sports Centre Trust venue Arena Joondalup. However the highest multiple ticket concession reduces the entry price to below \$3.00.



A Balanced View (ABV)
Leisure Consultancy Services

COMPETITOR ANALYSIS FOR CRAIGIE LEISURE CENTRE			
Competitor	Location	Price	Facilities / Programs / Services
Balgay Aquatic Centre – Under Construction. Completion Date – December 2007	Balgay – 9kms 90 Princess Road, Balgay	TBA	Facilities <ul style="list-style-type: none">▪ 8 Lane 25m lap pool heated indoor▪ Leisure pool with beach access▪ Turbo channel ride▪ Program pool heated▪ Interactive water playground▪ Kiosk



Summary of Business

The new Balga Aquatic Centre is currently under construction and due for completion in December 2007. The new centre will have an eight (8) lane 25m indoor-heated pool (ranging in depth from 1.1m to 1.65m) and a 350 square metre leisure pool with beach access and a turbo channel ride. There will also be a 120 square metre warm water program pool (ranging in depth from 1m to 1.35m) and a 200 square metre interactive outdoor water playground. The water playground will be 'zero depth' meaning lifeguard supervision will not be required.

The new facility with the turbo channel ride and interactive water playground will compete with Craigie Leisure Centre for family / entertainment type market; however the distance should result in only the eastern side of the City finding this an option. It will attract families in the shared catchment area for whom location is not a factor. In addition, the separate program pool gives the Centre the attraction of being able to hold a greater number of aquatic activities such as programs for seniors and aerobics classes. However, due to the Centre's location 9kms to the South on the Eastern side of the freeway, the new facility is unlikely to be a major competitor of CLC.

In summary, the new Balga Aquatic Centre will have an array of facilities that will cater for all the community's leisure needs and will compete with CLC in the family market that live in the shared catchment zone. Overall, the Balga Aquatic Centre is unlikely to be a major competitor of CLC due to its location.



**A Balanced View (ABV)
Leisure Consultancy Services**

COMPETITOR ANALYSIS FOR CRAIGIE LEISURE CENTRE			
Competitor	Location	Price	Facilities / Programs / Services
Carine Senior High School	Everingham St, Carine, 6020	Vacswim \$2.00	Facilities: <ul style="list-style-type: none"> ▪ Outdoor 8 lane 25m pool with diving board. Programs: <ul style="list-style-type: none"> ▪ Vacation swimming lessons Services: <ul style="list-style-type: none"> ▪ Group bookings.
Greenwood Senior High School	Coolibah Drive, Greenwood, 6024	Vacswim \$2.00	Facilities: <ul style="list-style-type: none"> ▪ Outdoor 8 lane 25m pool Programs: <ul style="list-style-type: none"> ▪ Vacation swimming lessons
Warwick Senior High School	355 Erindale Rd Warwick, 6024	Vacswim \$2.00	Facilities: <ul style="list-style-type: none"> ▪ Outdoor 8 lane 25m pool Programs: <ul style="list-style-type: none"> ▪ Vacation swimming lessons
St Mary's Anglican Girls School	Elliot Rd, Karrinyup, 6018	\$100-\$140 for 10 consecutive day program	Facilities: <ul style="list-style-type: none"> ▪ Outdoor 8 lane 50m pool ▪ Diving pool ▪ Children's wading pool Programs: <ul style="list-style-type: none"> ▪ Vacation swimming lessons for small groups 1-6 persons. Lessons privately operated.



A Balanced View (ABV) Leisure Consultancy Services

Summary of Business

Four schools with swimming pools were identified within a 10km radius of Craigie Leisure Centre – Carine Senior High School, Greenwood Senior High School, Warwick Senior High School and St Mary's Anglican Girl's School. They compete with CLC only in the children's learn to swim market during school holidays as none of the facilities open their pools to the general public for lap swimming or recreation. Although the lessons held at the schools are priced much lower than Craigie, all of the pools are unheated and outdoors. In addition, Vacswin lessons are held for only a short period during the October and December / January school holidays. For these reasons, the schools share of the learn to swim market is very limited and could not be considered significant competitors of Craigie Leisure Centre.