

Northern Beaches Council

SPORTSGROUNDS NEEDS ANALYSIS

DECEMBER 2016

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1. Executive Summary

1.1 Overview of Study Scope, Approach and Key Findings

In response to demands expressed by sporting organisations about a severe shortage of sportsgrounds and the need for new and improved facilities on the Northern Beaches, the Council engaged consultants Otium Planning Group to undertake an independent analysis of sportsground provision and needs. At the same time it commissioned consultants, Golf Business Advisory Services (GBAS) to conduct a market assessment of golf course provision in order to assist Council in reviewing the equitable use of its public golf course land. This research would inform the Northern Beaches Sportsground Strategy.

This paper presents an overview of the findings of the research conducted to date for the Sportsground Strategy, an assessment of current and future needs, options for addressing those needs and a snapshot of the golf course market assessment.

In assessing sportsground needs, our work has involved an extensive review of relevant research and planning documents and budgets, meetings with Council officers, analysis of current and projected population, investigation of the current supply and use of sportsgrounds, meetings and/ or surveys with representatives of northern beaches sporting associations or clubs, surveys of schools, discussions and/ or surveys of state sporting organisations, and modelling of sports participation and population.

The modelling indicates a current shortfall in supply of land for sportsgrounds of approximately 24Ha (excluding ancillary land for car parking, amenities etc. estimated at 70% of actual playing space). When ancillary areas are included the shortfall amounts to approximately 40.9Ha. By 2031, if no new land is provided, this will increase to a shortfall of approximately 41Ha in actual playing area (or 70Ha including ancillary areas).

Whilst the shortfalls in supply are expressed as land areas, a number of measures can contribute to addressing the shortfall in supply of sportsgrounds. These include:

1. Making better use of existing sportsgrounds

- Installing lighting on presently unlit sportsgrounds
- Upgrading lighting of existing areas
- Reconfiguring existing fields to improve functionality and usage
- Upgrading drainage and surface quality to improve functionality
- Installing additional multi-purpose synthetic surfaces
- Installing special purpose synthetic surfaces
- Continuing to improve field maintenance and management practices to preserve and increase carrying capacities

2. Acquiring additional land for sportsgrounds

- Acquiring or securing additional land for new developments.
- Acquiring or securing other suitable land.
- Converting existing open space to sportsgrounds.
- Partnering with schools or other institutions.

3. Reviewing Management Arrangements

- Examining the use of new technology
- Reviewing sportsgrounds allocation and management
- Accommodating training demands away from playing areas where practical
- Encouraging sports to consider rescheduling training and competition times where practical



Elaboration of these options is provided at Section 8. An analysis of all options to address the shortfall of sportsgrounds and to improve facilities will be undertaken and presented in detail in the draft Sportsground Strategy for community feedback.

1.2 Key findings from the Golf Market Assessment report

- The Northern Beaches has a total of 13 golf facilities (see map at page 10).
- Seven (7) of the 13 clubs are situated on public land. Only golf facilities on public land, from the perspective of Council, could potentially have an alternative use.
- Of the clubs in the Northern Beaches there has been an overall decline in membership over the last decade of 10%, representing an annual average decline of 1.2%.
- The 8 facilities that have a public element to them have experienced a 16% decline over the last decade representing an average annual decline of 1.9%.
- In recent times public green fee demand has generally been flat, with no growth evident in rounds played.
- The Northern Beaches has a high number of golf courses in total as well as a high number when assessed on a per head of population basis compared to other Sydney Local Government Areas and Sydney Planning Districts.
- Whilst profits are currently being achieved at the clubs within the area of focus, they are not at a level that allows for sustained re-investment in facility infrastructure.
- A reduction in supply may further assist the market to achieve greater sustainability

The findings of the Golf Market Assessment report will be considered for the Sportsground Strategy. Elaboration of these findings is provided at Section 9.



2. Introduction

2.1 Catalyst for the Project

The creation of the new Northern Beaches Council in May 2016 provided an opportunity to put in place a single approach to the management and long term planning of sporting facilities on the Northern Beaches. Council has commenced work on a long term sports facility plan - the Northern Beaches Sportsgrounds Strategy. Council proposes that this Strategy will guide development of its sportsgrounds and facilities over the next 15 years.

Sporting organisations have for some time been calling for more and improved sportsgrounds and facilities on the Northern Beaches. Groups representing almost all of the estimated 50,000 active playing members have advocated that Council also review whether Council golf courses could be more equitably used for sport.

In response to the advocacy from these major sporting groups Council also resolved on 27 September 2016 to “Conduct a review of golf courses as part of the Northern Beaches Sportsgrounds Strategy, including how to best use the land currently occupied by Warringah Golf Course for recreational purposes for the Northern Beaches community”.

In October 2016 Council engaged specialist consulting firms to undertake the following studies:

- Sportsground Strategy (Otium Planning Group)
- Golf Market Assessment (Golf Business Advisory Services)

2.2 Scope of Sportsground Strategy

The aim of the Sportsground Strategy is to:

Determine the adequacy of supply of sportsground facilities in the Northern Beaches LGA and identify and prioritise current and projected needs over the next 15 years.

It will inform Council’s capital works program, potential projects for external funding, and long term planning for sportsgrounds and facilities.

The following sports are covered in the scope of the study:

- | | | |
|-----------------------|----------------|---------------------|
| • Archery | • Gridiron | • Rugby Union |
| • Athletics | • Hockey | • Soccer (Football) |
| • Australian Football | • Netball | • Softball |
| • Baseball | • Oztag | • Touch Football |
| • Cricket | • Rugby League | • Ultimate Frisbee |

Specific objectives of the Sportsground Strategy include to:

- Identify the extent of any current and future (to 2031) shortfall in sportsgrounds and facilities
- Clearly articulate the rationale for determining current and future sportsground needs
- Identify potential locations for future sportsgrounds
- Identify opportunities to improve the functionality and usage of existing sportsgrounds
- Investigate opportunities for partnerships in meeting current and future sportsground needs
- Identify policy changes that would improve the capacity to address demands
- Prepare a report to facilitate community and stakeholder input
- Undertake a comprehensive stakeholder and community engagement process to inform the preparation of the Draft Sportsground Strategy
- Prepare a Sportsground Strategy report and Implementation Plan



2.3 Scope of the Golf Market Assessment

The purpose of the golf market assessment in the Northern Beaches was to:

- Estimate the current and future level of demand for golf on the northern beaches.
- Describe the current and likely future level of provision of golf courses on the northern beaches and implications for public open space.
- Analyse the relationship between the current and future supply of and future demand for golf on the northern beaches
- Make recommendations for public land managers with regard to the future provision of public golf courses on the northern beaches.

The findings of this research will inform the Sportsground Strategy. A brief synopsis of the findings of this report is outlined at Section 9.



3. Methodology

In compiling the information for this report, the following methodology was adopted:

- Meetings with Council officers
- Review of 2016-17 Operational Plan, Sportsground capital budget, and existing plans and studies undertaken by the former Manly, Warringah and Pittwater Councils
- Analysis of current (2016) and projected (2031) population
- Inventory and mapping of existing sportsgrounds
- Interviews with representatives of Associations or clubs (if no sporting association(s) exists for that sport on the Northern Beaches):
 - Australian Football
 - Athletics
 - Baseball
 - Cricket
 - Hockey
 - Netball
 - Oztag
 - Rugby League
 - Rugby Union
 - Soccer (Football)
 - Six-a-Side Soccer
 - Softball
 - Touch Football
 - Ultimate Frisbee
- Interviews with the Manly Warringah Pittwater Sporting Union
- Surveys of all Northern Beaches sporting associations or clubs (if no sporting association(s) exists for that sport on the Northern Beaches) in the sports listed above, plus archery, gridiron and touch rugby league
- Discussions and/ or surveys with State Sporting Organisations in Australian Football, Athletics, Baseball, Cricket, Hockey, Netball, Rugby League, Rugby Union, Soccer (Football), Softball and Touch Football
- Survey distributed to all schools in Northern Beaches LGA
- Analysis of research and consultation findings
- Assessment of needs
- Preparation of Report



4. Strategic Context

4.1 Background Research

A review of over 50 local, regional, state and federal planning documents relevant to sport was undertaken to provide strategic context for this report. Key plans and studies undertaken by the former Manly, Warringah and Pittwater Councils that were reviewed included:

- Northern Beaches Council Operational Plan 2016-17
- Warringah Council Sports Field Audit, 2015
- Pittwater Public Space and Recreation Strategy, 2014
- Draft Ingleside Precinct Structure Plan, November 2014
- NSROC Regional Sportsground Management Strategy, 2013
- Draft Report on Potential Synthetic Sportsfield Sites in Warringah, 2012
- Warringah Recreation Strategy, 2009
- Pittwater Local Planning Strategy, 2011
- Warringah Council, Sports in Warringah Strategy, 2004
- Local Environment Plans in former Manly, Warringah and Pittwater Councils
- 13 Plans of Management in former Manly, Warringah and Pittwater Councils
- Section 94 Developer Contributions Plans in former Manly, Warringah and Pittwater Councils

Key NSW Government reports reviewed included:

- NSW Government Response to the Parliamentary Inquiry into Sportsground Management in NSW, 2007.
- Game Plan 2012 - NSW Sport and Recreation Industry Five Year Plan
- NSW Open Space Planning Guidelines, 2010
- DET Community Use of School Facilities Policy, 2009

The 2011 Pittwater Local Planning Strategy reported a shortage of playing fields, although not considered critical at that stage, and recommended that further planning identify shortages and options for additional provision. It noted that there is limited potential to increase the number of playing fields. The subsequent 2014 Pittwater Public Space and Recreation Strategy found that sportsfields are insufficient to meet the needs of the existing community due to the demand for games and training as well as the management regimes. It noted that a number of sports fields are situated on former landfill sites and subject to subsidence; fields are intensely worn in winter; the soil profiles of many fields have low nutrients and poor water holding capacity; inadequate lighting on many fields; and recommended pursuing opportunities to purchase suitable land, continued reconfiguring of fields to optimise available space, partnerships with schools, improved drainage and lighting, and feasibility study for a synthetic hockey pitch.

The 2004 Sports in Warringah Strategy noted that Warringah's supply of sportsgrounds is higher than Manly and Pittwater and generally higher than most metropolitan Councils in Sydney. However, when considering factors such as age, location, gender and time of availability, demand is not met at all times, particularly in peak playing periods. The subsequent 2009 Warringah Recreation Strategy reported that, despite the good supply of sportsgrounds, there are constant requests from sporting associations for additional fields, particularly for soccer, hockey, softball and cricket. The report noted that a number of Warringah Council's sport fields are situated on former landfill sites and therefore subject to subsidence.

The more recent 2015 Warringah Council Sports Field Audit found that a number of fields had poor surface drainage with free water lying for extended time after rainfall. Similar research in the former Manly and Pittwater Councils informed their annual sportsground budgets.



A 2007 Inquiry into Sportsground Management in NSW recognised that there is a ‘chronic shortage’ of sporting venues in many local government areas and existing facilities are subjected to increasing user pressures. Recommendations included use of public and private schools, improved playing surfaces, reduced playing seasons, improved lighting, land acquisition in high demand areas, and provision of active sportsgrounds in new release areas.

The NSW Department of Education has recently prepared a draft policy on joint provision of facilities which will facilitate a greater number of Council/ Education partnership opportunities.

4.2 Council Investment in Sportsground Improvements

The improvement of sportsgrounds had been a high priority for the former Manly, Warringah and Pittwater Councils. From information provided by Council, Table 1 below highlights a range of sportsground improvement projects since 2010. This excludes other Council contributions including for sportsground and facility maintenance and renewal.

Table 1: Examples of Sportsground Projects - former Manly, Warringah, Pittwater Councils (2010-2016)

Year	Project	Cost Overview
2010/ 11	Weldon Oval - major redevelopment	\$3,200,000
	Abbott Rd fields 1, 2, and 3 - lighting	\$230,000
	Forestville Playing fields - lighting	\$170,000
	Brookvale Park - irrigation, drainage	\$120,000
	Kierle Park - irrigation	\$80,000
2011/ 12	Cromer Park field 1 - synthetic surface	\$1,300,000
	Nolan Reserve - lighting	\$800,000
	Adam Street Oval - reconstruction & irrigation	\$650,000
	Hitchcock Park - field & irrigation	\$350,000
	North Narrabeen Reserve - lighting	\$75,000
2012/ 13	Cromer Park - major redevelopment including additional field, lighting, irrigation, car park, drainage	\$2,800,000
	Narrabeen Sports High - major redevelopment, synthetic surface, turf field, lighting	\$1,700,000
	Miller Reserve - lighting	\$450,000
	David Thomas Reserve - irrigation	\$140,000
	Porters Reserve - upgrade & turfing	\$120,000
	Lake Park - lighting	\$100,000
	Hitchcock Park - drainage	\$75,000
	Boondah Reserve - upgrade & turfing	\$60,000
2013/ 14	Terrey Hills Oval - lighting	\$210,000
	LM Graham Reserve - upgrade roadways, open spaces, sight screens, fencing	\$150,000
	Harbord Park - irrigation	\$125,000
	Forestville Playing fields - lighting rugby field	\$110,000
	North Narrabeen Reserve field No 4 - drainage	\$50,000
	Newport Oval - cricket bays	\$35,000
2014/ 15	Forestville Playing fields - major redevelopment synthetic surface, rugby field	\$3,350,000
	Harbord Park - lighting	\$180,000
	Manly West Park - drainage, new synthetic wicket	\$60,000
2015/ 16	LM Graham Reserve - crickets nets grass & synthetic, storage, surface & wicket table upgrade, fencing	\$460,000
	Kierle Park No 1 field - upgrade surfaces & amenities	\$160,000
	Careel Bay Playing Field No 3 - lighting	\$130,000
	Boondah Reserve field No 1 - lighting	\$125,000
	Kitchener Park field No 2 - drainage	\$50,000
	Griffith Park - irrigation	\$50,000



It is worth noting that local sporting associations/ clubs, and in some cases state sporting organisations and other tiers of government, have over many years also contributed to the development of sports facilities on the Northern Beaches. For example, under the former Warringah Council's Sporting Groups Capital Assistance Program, over \$1.5m in sportsground and facility upgrades were undertaken from 2013. The Northern Beaches Council has currently programmed to undertake a range of sportsground works outlined at Table 2 over the next four (4) years. This is currently under review as part of the 2017/18 budget process. The Northern Beaches Sportsground Strategy will influence future capital works programs including the timing and priority of sportsground projects.

Table 2: Overview of Capital Works for sportsgrounds currently scheduled 2016/17 to 2019/20

Location	Scope of Work	2016/ 17	2017/ 18	2018/ 19	2019/ 20
Lionel Watts	Drainage, cricket nets, hardcourts, lighting	\$1,100,000			
Killarney Heights Oval	Upgrade lighting, cricket facilities, irrigation	\$370,000			
Porters Reserve	Upgrade drainage, turf	\$50,000			
Warriewood Valley Sportsground	Irrigation	\$160,000			
LM Graham Reserve	Field upgrades	\$133,900			
Seaforth Oval	Irrigation, lighting	\$110,000			
Kitchener Park	Cricket nets	\$70,000			
St Matthews Farm	Drainage, irrigation, reconfigure to create new field, lighting	\$50,000	\$1,100,000		
Reub Hudson/ Denzil Joyce Ovals	Upgrade fields, drainage, irrigation, lighting		\$50,000	\$1,050,000	
Collaroy Plateau Park	Lighting			\$125,000	
Dee Why Oval	Lighting			\$250,000	
John Fisher Park Netball	Court upgrades			\$50,000	\$800,000

4.3 Population

The estimated 2016 population of the Northern Beaches Council is 262,532.¹ This is forecast to increase to 294,907 by 2031 representing an increase of 32,375 (or 12.3%) between 2016 and 2031.²

As at the 2011 Census, the Northern Beaches Council area had a higher median age (39) than Sydney (36) and NSW as a whole (38). Median household income in the Northern Beaches (\$1,803) was much higher than Sydney (\$1,444) and NSW as a whole (\$1,233). Compared to Sydney the region had a much lower proportion of persons from non-English speaking backgrounds (13%) compared to Sydney (26%) and a much lower index of disadvantage than Sydney as a whole.

This snapshot suggests a likely demand for more traditional sporting activities and a greater capacity to meet the costs of participation in sport.

¹ <http://forecast.id.com.au/northern-beaches>

² <http://forecast.id.com.au/northern-beaches>



5. Current State of play - Overview of Supply and Usage of Sportsgrounds

This section of the Report provides an overview and analysis of Northern Beaches Council sportsgrounds and their current utilisation and supply.

It is acknowledged that in addition to Council fields, there are facilities provided by other organisations which are accessed by community sporting bodies. These include Sydney Academy of Sport, Narrabeen Sports High and some other schools. However, there are also a number of Council fields that have restricted access for general community use due to lease and/or licence agreements. These include Brookvale Oval, Cromer Park Synthetic, Wakehurst Rugby Park, Forestville Rugby Park and Manly Oval. Facilities that Council manages access to for the majority of peak hour usage (after 4pm weekdays and from 8am onwards on weekends) have been examined in detail.

5.1 Sportsground Inventory

Council's inventory of booked sportsgrounds is distributed across 62 sites supplying a total playing area of 116.5Ha (actual field space) within a total land area of 203.3Ha. The difference between these two areas (86.8Ha) represents ancillary areas (e.g. car parks, amenities, landscaping, pathways and informal open space). This area is approximately 75% of the sportsground playing surface area which is consistent with ratios established by Otium Planning Group (OPG) in other sportsground planning projects in NSW, ACT and Queensland. Of these venues, 53 have some form of lighting for either training and/or competition.

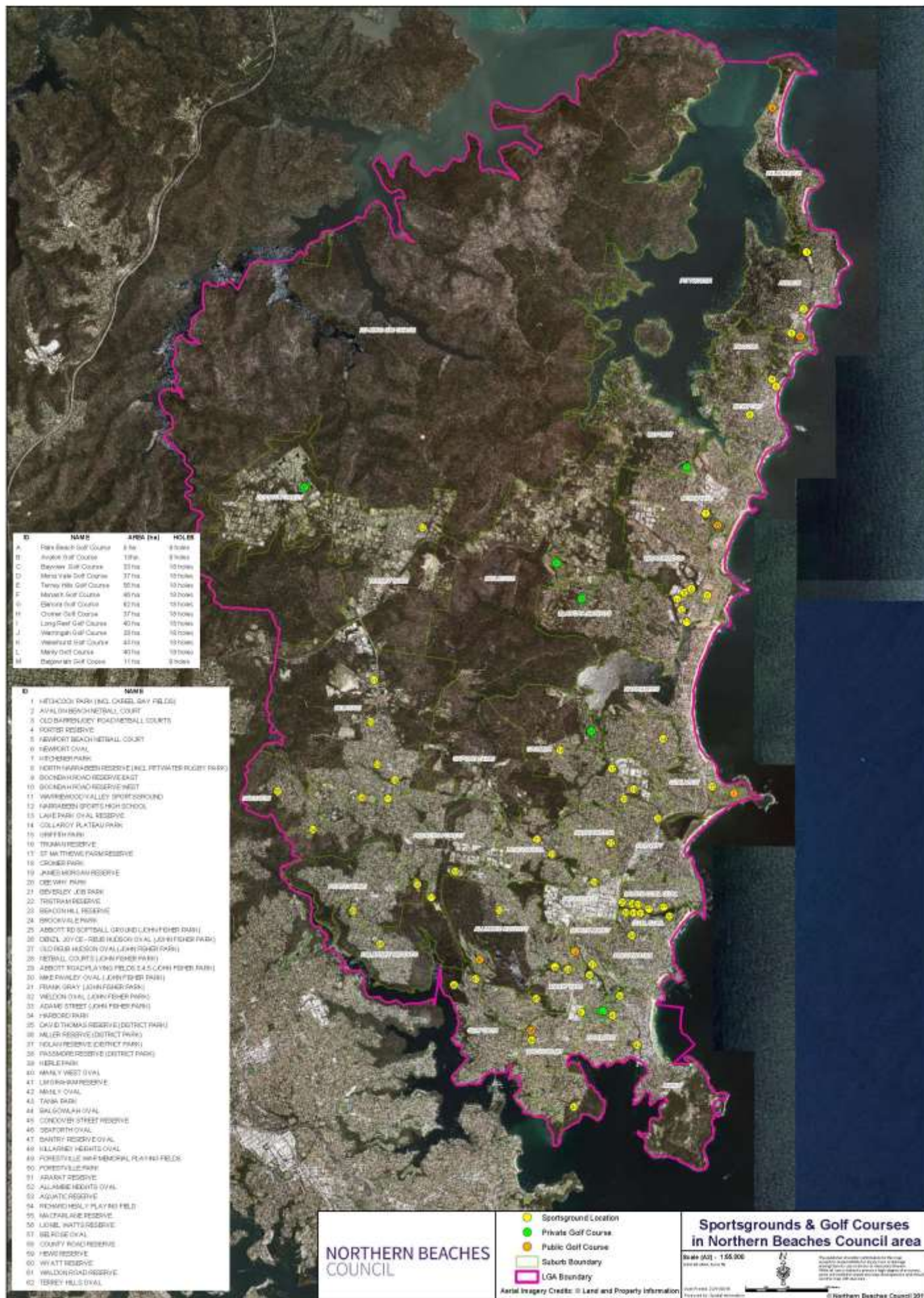
In its winter configuration, these facilities provide approximately 87 'rectangular' fields; 9 ovals; a range of 'mini' fields; up to 7 baseball fields; 49 natural turf netball courts and 35 hardcourt netball courts. Three sites have a synthetic sports surface installed (Cromer Park, Forestville and Narrabeen Sports High). In summer, areas are reconfigured to cater for other field sports including softball, touch, oztag, small sided football, AFL 9's and cricket (up to 45 pitches).

An aerial photo showing the distribution of Northern Beaches Council sportsgrounds, netball courts and golf courses throughout the LGA is provided on the following page.

5.2 Limitations of Current Supply

The current supply of sportsgrounds is constrained by a number of factors that impact on their functionality for sport, namely:

- A number of grounds are small, with no expansion capacity, and are suitable only for junior sport.
- Some grounds are subject to flooding and/ or poor drainage and take longer periods to recover after rain events
- While lighting is installed on many grounds, the level and/ or coverage of lighting is limited in some cases
- A number of grounds are situated on ex-landfill sites and are subject to subsidence and/ or have poor surfaces
- Many grounds in the former Pittwater Council are situated on sandy soil profiles with low nutrient and poor water holding capacity





5.3 Analysis of Sportsground Usage

This section examines the current booking and usage patterns of Northern Beaches Council sportsgrounds and has been developed by scrutinising Council's sportsground booking data. Whilst it is acknowledged that booking data may not always accurately represent actual utilisation, it remains the only attainable and consistently applicable data available.

It is generally accepted that sportsground utilisation and facility condition have a direct and inseparable relationship. To assist in managing this issue, the former Warringah Council engaged *Living Turf* (turf consultants) to assess its sportsgrounds. This assessment found fields at Melwood (Forestville Memorial Playing Fields), Collaroy Plateau Park, St Matthews Farm, David Thomas Reserve and Miller Reserve were in the poorest condition and suggests that any use of more than 25 hours a week will contribute to a deterioration of the playing surface. It should be noted however that it is very common for playing fields in metropolitan Sydney to exceed 25 hours' usage per week.

For the purpose of the analysis below, two scenarios have been created by setting and applying two capacity benchmarks for utilisation. These have generally been set at 30 hours per week and 35 hours for most fields. However, for specific fields, capacity allowances have been increased up to 54 hours per week where 'light' impact sports (e.g. baseball) are the main user and/ or synthetic surfaces are installed³. These specific capacities remain constant between the two scenarios.

The 'higher' general benchmarks (i.e. higher than the 25-hour mark identified by *Living Turf*) have been utilised to provide a more conservative approach and to combat a possible 'overstatement' of utilisation based on booking data. Furthermore, many turf consultants recognise that not all use is equal. That is, higher impact sports (greater numbers, game play and footwear) and user types (adults v children) may result in higher or lower surface deterioration. However, the booking data available does not generally make these distinctions. Also, it may be reasonable to accept some deterioration in surface condition over a season, so long as it can 'recover'⁴. For these reasons, the higher benchmarks (30 and 35 hours per week) have been utilised.

Council's booking schedule identifies 132 individual 'bookable' spaces. However, of these, 10 are netball court areas. For the purpose of this analysis the netball court areas have been set aside, leaving 122 individual sports field areas. The focus of this analysis is on the winter season as this is when demand reaches its peak and supply is at its most tenuous due to growing conditions for natural turf.

Although Council's booking schedule included some data for school bookings, this has been excluded from this analysis because it was not available for all fields and there are varying bookings anomalies and impacts caused by school use. Excluding school use also enables a more direct analysis against industry standards and the benchmarks utilised for this analysis. Naturally, school use only exacerbates utilisation impacts caused by afternoon/evening and weekend use.

5.3.1 Winter Season Analysis

The data used for this analysis was based on the seasonal allocation for winter 2016. The winter season runs from April to August and summer season from September to March. Sports fields are generally available for allocation between the hours of 4pm to 9.15pm weekdays and 8am to 6pm weekends. Some fields are available for allocation until 9.30pm on weekends. There were some variations in seasonal allocations between the former Manly, Warringah and Pittwater Councils.

Council's winter booking schedules were interrogated against the benchmarks utilised for this research (Benchmark 1 - generally 30 hours per week, Benchmark 2 - generally 35 hours per week). A summary of this analysis is shown in the table below.

³ Fields with alternative capacity benchmarks include synthetic fields at Forestville and Narrabeen High (54hrs), baseball diamonds at Aquatic Reserve (54hrs) and softball diamonds at Abbott Road (40hrs).

⁴ The Living Turf report on Warringah Council fields indicated that Dee Why Park, John Fisher Park, David Thomas Reserve, Killarney Heights Oval, Miller Reserve, Collaroy Plateau Park field 3 had ground cover below 85% which indicates the need for re-turfing.



Table 3: Weekly sportsground utilisation compared to benchmarks

	30-HOUR PW SCENARIO (BENCHMARK 1)		35-HOUR PW SCENARIO (BENCHMARK 2)	
Areas over benchmark	96	78.7%	92	75.4%
Areas equal to benchmark	5	4.1%	5	4.1%
Areas under benchmark	21	17.2%	25	20.5%
Total	122	100%	122	100%
Total booked hours	4,997		4,997	
Total capacity in hours	3,902		4,442	
Cumulative hours of areas over benchmark	-1,286		-822	
Cumulative hours of areas under benchmark	191		267	
Excess/ Shortfall to Benchmark Capacity (Total)	-1,095	-28.1%	-555	-12.5%

This analysis demonstrates that, as a whole, Council fields (based on booking data) are over booked according to the established benchmarks (78.7% above the 30-hour scenario and 75.4% above the 35-hour scenario). There are a small number of fields under the established benchmarks (17.2% and 20.5% respectively); however, when the 'Total Capacity' of all fields is compared to the 'Total of Booked hours', there is a significant overall shortfall under both scenarios. That is, **demand (represented by booked hours) outstrips supply (represented by total capacity) by over 28% in the 30-hour scenario and 12.5% in the 35-hour scenario.**

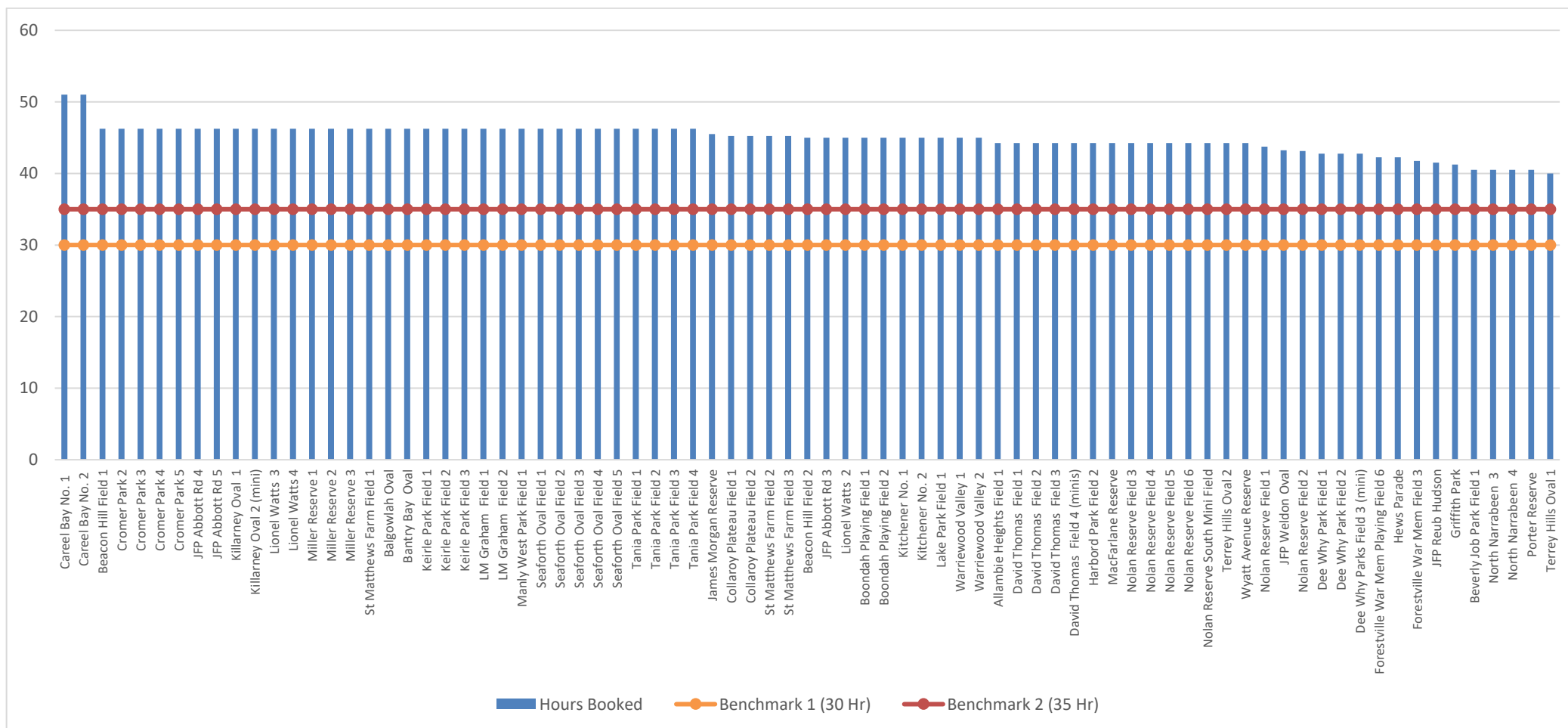
Under the more conservative 35-hour scenario, 92 of the 122 fields are booked beyond the capacity benchmarks utilised for this research and 49 of these are booked more than 10 hours above the benchmarks utilised for this research. Interestingly, adopting a general benchmark of 30 hours only increases the number of fields booked beyond capacity by four to 96 in total (compared to 92 under the 35-hour scenario). The more remarkable impact of this scenario is on the total shortfall in capacity (supply) compared to bookings (demand). Under the 30-hour scenario the shortfall is 1,286 hours or 28.1% compared to 555 or 12.5% under the 35-hour scenario.

A summary of field utilisation is shown in a series of figures on the following pages which illustrate fields that are overbooked, those that are 'marginal' and those fields that are not fully allocated.



Figure 1 shows the fields (79) which are booked more than five hours in excess of the 30 and 35 hour benchmarks.

Figure 1: Fields booked more than 5hrs per week over applied benchmarks



This shows that the two most ‘over booked’ facilities are Careel Bay No.1 and No.2 which are booked at up to 51 hours per week (21 hours over the 30-hour benchmark).



Figure 2 shows fields (25) that are marginally over or under booked according to the benchmarks utilised for this analysis⁵.

Figure 2: Fields booked within 5 hours of applied benchmarks

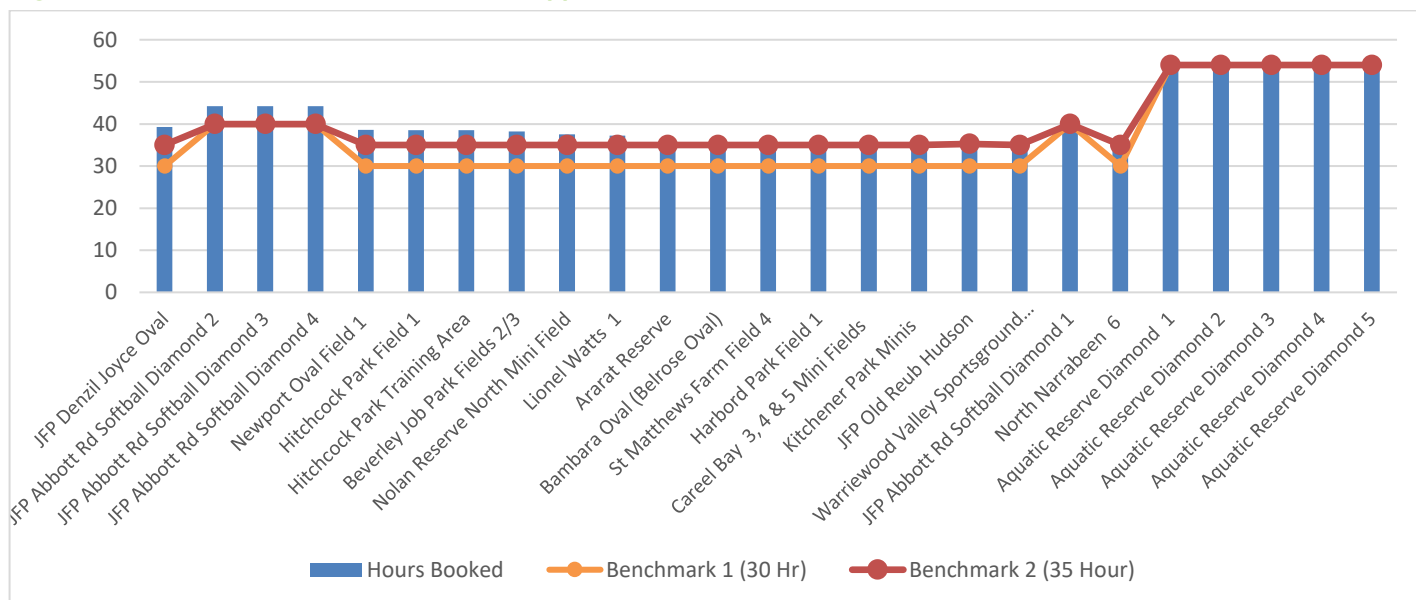
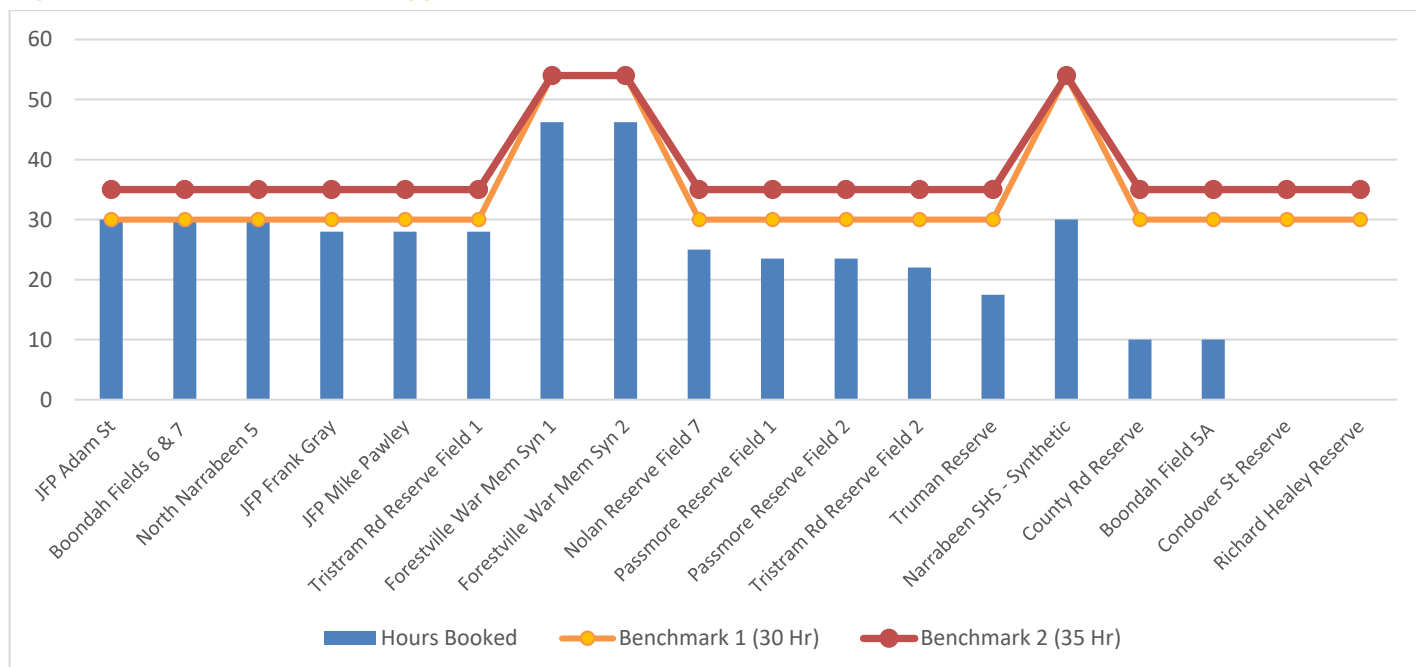


Figure 3 shows fields (16) that have been booked below the benchmarks utilised⁶.

Figure 3: Fields booked below applied benchmark



Although three of these are in fact synthetic fields, it is worth remembering that the benchmark for these fields is set at 54 hours per week. Also, the synthetic surface at the Forestville War Memorial playing fields is a relatively new addition to the supply chain.

⁵ Fields with alternative capacity benchmarks include baseball diamonds at Aquatic Reserve (54hrs) and softball diamonds at Abbott Road (40hrs).

⁶ Fields with alternative capacity benchmarks include synthetic fields at Forestville (Melwood Oval) and Narrabeen Sports High (54hrs).



5.3.2 Summer Season Analysis

Council's summer booking schedules were interrogated using the 30 and 35 hour per week benchmarks outlined previously. However, given stronger growing conditions for turf in the summer season and the tendency for lower impact sports to be played, these benchmarks are less appropriate. Furthermore, total booking hours are lower in summer (3,584) than in winter (5,059). Nevertheless, if the two benchmarks are applied they show an excess in capacity of 8% on the 30-hour scenario and 19% on the 35-hour scenario. This is despite a significant number of fields being over the benchmark hours (50% in the 30-hour scenario and 42% in the 35-hour scenario).

At face value, this analysis suggests that reallocation of bookings from fields that are 'overbooked' to fields that are 'under booked' would provide a more balanced outcome within the total capacity of the sports field supply chain. However, a specific issue for consideration during the summer season is the supply of cricket pitches particularly for junior games. To accommodate the 1,652 junior players and the estimated 127 teams in the Northern Beaches area, a minimum of 64 games need to be played each week. In total, cricket associations utilise 48 pitches including 5 on school fields for their junior competitions. Given that not all of the 64 games can be held at the one time (Saturday mornings), games are currently held on Saturday mornings, Saturday afternoons and Sundays. Games held outside of Saturday mornings raise some conflict with senior competitions. Furthermore, cricket associations have been unable to establish significant 'mid-week' competitions due to the allocation of fields to other sports.



6. Engagement with Sporting Organisations and Schools

6.1 Sporting Organisations

Sporting associations, clubs (where no association exists on the Northern Beaches) and State Sporting Organisations within the scope of the study were interviewed and/ or surveyed.

6.1.1 Membership

From information provided by local associations, clubs or state sporting organisations, there are around 50,000 active playing members of sports within the scope of this study on the Northern Beaches. Some of these may be participants in more than one sport, or may play in fixtures outside of the Northern Beaches LGA. According to the relevant state sporting organisations, Manly Warringah Softball Association is the largest softball association in NSW and Manly Warringah Football Association is the second largest soccer (football) association in NSW.

By far the highest participation numbers are in soccer (football) with approximately 17,648 registered players in Manly Warringah Football Association and a further 3,775 registered playing members in a separate Six-a-Side Soccer association. Active playing members in each sport are summarised in descending order in the table below:

Table 4: Active playing members in sports with study scope

Sport	Active Members
Soccer (Football)	17,648
Touch Football	6,526
Netball	5,633
Rugby Union	3,824
Six-A-Side Soccer	3,775
Rugby League	2,500
Cricket	2,249
Softball	2,213
Australian Football	1,346
Baseball	1,318
Hockey	1,265
Athletics	1,189
Oztag	700
Ultimate Frisbee	160
Touch Rugby League	150
Archery	78
Gridiron	75

The sports experiencing highest growth are Australian football, soccer (female), six-a-side soccer, junior cricket and touch football. Some sports have had fairly static membership in recent years (i.e. rugby league, archery, baseball, netball, softball and hockey) however the absence of suitable facilities has inhibited membership growth in softball and hockey.

6.1.2 Trends or Changes in Patterns of Participation (as Expressed by Sports)

The most frequently expressed trends affecting participation patterns are:

- An increase in female participation, largely due to the success of women's competition at elite levels (e.g. football, cricket, AFL and Rugby 7's) and a push for female participation in sport
- Modified competition structures at the national and elite level (e.g. T20 cricket)
- Demographic change (e.g. increase in young families)



6.1.3 Most Common Issues Affecting Sports (as Expressed by Sports)

From consultation with local, regional and/or state sporting organisations, the main issues and concerns expressed by these sports are:

- Insufficient playing areas to meet competition and training needs
- Sports turning away participants or modifying rules, playing times or access to fields to accommodate demand (these sports include soccer, touch football, cricket, Australian football, and six-a-side soccer)
- Unlit or inadequately lit playing areas restricting their availability or suitability for evening use
- Demand for additional or upgraded facilities requiring specialist surfaces
- Small grounds or single field only grounds unsuitable for senior use and/ or unable to be expanded
- Fields not at size or standard that complies with sport requirements
- Poor playing surfaces from over use, subsidence, or poor drainage
- Cricket pitches intruding on playing fields during winter and causing injuries
- Substantial growth in women's participation
- Inadequate provision of, or poor standard of, amenities/ change rooms (especially in those sports with high numbers of female participants or experiencing growth in female participation)
- Ground allocation process not maximising usage
- Lack of storage areas (with some having to store equipment off site)
- Lack of car parking

6.2 Snapshot of Main Needs Expressed by Individual Sports

In summary, the main issues as expressed by sporting groups, that are affecting their sport are as follows:

Table 5: Main issues expressed by sporting groups

Sport	Key Issues Raised by Sports
Australian Football	Substantial growth in last 3 years with major increase in female participation. Insufficient grounds to meet demands and inadequate lighting. Demand for new ovals, reconfigure/ expand grounds (e.g. Balgowlah Oval), install lighting to some grounds especially for training (e.g. Frank Gray Oval, Mike Pawley Oval), upgrade lights (e.g. North Narrabeen Reserve, Balgowlah Oval), conversion of high use grounds to synthetic surface (e.g. Lionel Watts Reserve), and better amenities especially for female players.
Archery	Seeking security of tenure for playing venue.
Athletics	Competitions are held at Sydney Academy of Sport, Narrabeen which is heavily booked. Groups consider the track and throws area is in need of upgrading or an alternative synthetics athletics track provided elsewhere. Club grounds used for training have insufficient storage.
Baseball	Some grounds are small and/ or suffer damage from winter season use. Demand for upgraded lighting (e.g. North Narrabeen & Aquatic Reserve) and new or upgraded amenities facilities (e.g. North Narrabeen & Aquatic Reserve), batting cages and fences.
Cricket	Demand for additional grounds as existing supply is insufficient to cater for current number of teams and future growth. Only 48 grounds available for 68 junior games on weekends. Game times have been modified and undersized fields accessed to accommodate teams. Poor surface quality on some grounds. Inadequate number of turf practice nets and enclosed synthetic practice nets. Some nets poorly positioned or in poor condition. High growth in women's participation. Demand for improved amenities. Cricket NSW seeking to establish a Centre of Excellence (1 of 11 proposed for metropolitan Sydney).
Gridiron	No demands expressed.



Sport	Key Issues Raised by Sports
Hockey	Poor grass cover or undersized fields (e.g. turf cricket pitch at Frank Gray Oval means field has to be narrower). Demand for a dedicated synthetic hockey surface on the northern beaches. This is a high priority for the state body which advised that, of the estimated 3,000 players in the wider North Sydney Beaches Hockey Association, less than one third play locally (on grass or multi-sport fields) while the balance travel west and south across Sydney to play on suitable synthetic surface facilities for training and competition.
Netball	Abbott Road headquarters is the only competition venue in Northern Beaches. No expansion capacity at this venue. Street parking is very limited and the adjacent school is understood to have recently withdrawn access to the school grounds for parking. Three (3) of the 48 courts provided are unusable at present due to inadequate size or drainage issues. Training courts at other locations are mostly grass with no, or inadequate, lighting. Some courts were lost due to new busway at North Narrabeen. Demand for conversion of grass courts to hard surface and new/ upgraded lighting (e.g. Lionel Watts Reserve, Boondah Reserve, Forestville War Memorial Playing Fields).
Oztag	Main issues are related to costs and past difficulties with field lighting system resulting games being delayed or cancelled.
Rugby League	Grounds are overused and grass surfaces unable to cope with levels of use. Fields have been modified to accommodate juniors. While current playing fields accommodate current needs it is important to retain existing allocation to rugby league. Demand for suitable amenities blocks (Nolan & Beacon Hill Reserve) and upgraded amenities (Denzil Joyce field).
Rugby Union	Undulating playing fields, poor surface quality, inadequate lighting, and amenities blocks undersized and in poor condition (Denzil Joyce and Reub Hudson fields). Changerooms/ amenities/ public toilets in poor condition and need for upgraded lighting (Pittwater Rugby Park). Demand for additional field for Newport Rugby.
Six-a-Side Soccer	Major growth in participation but unable to get sufficient ground allocation to meet demands. Players are being turned away. Currently use Pittwater Rugby Park and Brookvale Oval. Play in summer, mostly mid-week afternoons and evenings, but would like to play year round. 60% of members play six-a-side exclusively and no other form of soccer. Prefer natural grass rather than synthetic. Demand for additional fields, better lit grounds, and improved maintenance and irrigation of grounds.
Soccer (Football)	Second largest Association in NSW. Have modified competitions and restricted access to playing fields for training in order to meet demands. Demand for additional fields including synthetic fields (geographically dispersed) to take pressure off grass fields (e.g. Lionel Watts Reserve and Seaforth Oval). Synthetic surface at Cromer Park resulted in major increase in usage. Demand for improved playing surfaces, drainage/ irrigation of some grounds. Cricket pitches intrude on playing fields in some areas which creates a safety issue. Demand for installation of new lighting or upgraded lighting (e.g. Passmore Reserve, Nolan Reserve, Lionel Watts Reserve, Kitchener Reserve, LM Graham Reserve, and Tania Park). High women's participation. Some grounds have no amenities, and others have no female/ unisex change rooms.
Softball	Largest Association in NSW but cannot host state championships for over 15's as there are no full size fields in Northern Beaches. Grounds at softball's Abbott Road headquarters have overlapping diamonds which are 40% undersized, and also has inadequate lighting (only 2 poles for 2 diamonds). Softball has modified length of games to meet competition needs. Demand for additional full size playing fields. Inadequate amenities (especially for female sport), uneven playing surface, diamonds not enclosed at Abbott Road.
Touch Football	Unable to get sufficient ground allocation to meet demands for evening competitions. Turning away 20 teams at North Narrabeen Reserve and 30 teams at Nolan Reserve. Lost access to spillover fields at North Narrabeen Reserve to parking. Demand for access to additional fields. Would like to install lighting at Passmore Reserve. Nolan Reserve is subjected to flooding and residual water after rain events - need to improve drainage. Insufficient amenities at Nolan Reserve for number of players. Poorly located cricket pitches on some reserves which creates a safety issue.
Touch Rugby League	No demands expressed
Ultimate Frisbee	No demands expressed other than need for permanent line marking.



6.3 Schools

Surveys were distributed to all 100 schools within the Northern Beaches LGA to seek information on their usage of Council sportsgrounds, levels of satisfaction, current/proposed school facilities available for community use, and partnership opportunities.

6.3.1 Use of Existing School Facilities

Four of the responding schools indicated they had sporting facilities that were available for community use (most commonly playing fields, netball courts and cricket practice nets). It is known that far more schools than those that responded to the survey have facilities used by sporting groups in the Northern Beaches.

6.3.2 Proposed School Facilities

Two schools indicated they were planning to develop sporting facilities available for community use in the next 5-10 years. Most notably Narrabeen Sports High advised they planned to develop indoor cricket and baseball batting cages and outdoor cricket practice nets.

6.3.3 Partnership Opportunities

Future partnership opportunities between Narrabeen Sports High and Council/State Sporting Organisations were identified for cricket and baseball.

6.3.4 Satisfaction with Council Facilities

Schools were overwhelmingly satisfied with the Council sporting facilities they used with the exception of netball courts at Boondah Reserve and Lionel Watts Oval (better maintenance, vandalism) and Plateau Park (lack of toilets/shade).



7. Assessment of Current/ Projected Needs

The analysis of likely demand and the amount of land required to meet that demand relies on a number of methodologies and the informed interpretation of results. Otium Planning Group has developed two models for estimating the current and future demand for sportsgrounds in the Northern Beaches - one is a generic participation based demand model and the other an allocation/ utilisation based demand model. The following sections provide an overview of each model and subsequent results for the Northern Beaches LGA.

7.1 Participation Based Demand Analysis Model

Demand for facilities can be estimated using available participation data and modelling of field or court capacity required to service that participation. OPG have developed a Demand Analysis Model based on participation data and a set of assumptions for facility/ field capacity, utilisation rates and a mix of lit and unlit fields.

The Demand Analysis Model uses the following information to produce both anticipated participation of a given population and the amount of land required to accommodate that population. In brief, it uses the following inputs:

- Population data within age cohorts
- Participation data
- Area needed for specific playing fields/ courts
- Capacity of playing fields/ courts to accommodate numbers of players
- Likely peak demand hours
- The mix of lit and unlit fields/ courts.

None of these sources are used as a stand-alone basis for the final estimate. Rather they form a set of data points that enable triangulation to a more refined prediction. The following are some key points in relation to the model for this study:

- Participation data used is sourced from survey returns from local sports associations and/or data supplied by state sporting organisations for the Northern Beaches area. Any issues with individual sports participation rates are not of particular concern when modelling the data for overall field sports participation. The aggregated participation data is more robust for the purposes of projection. To explain, while we can be less certain about exact numbers playing a particular sport such as Australian Football, we can be reasonably confident that participation in field sport as a whole will continue. So, though the land requirements to service field sport can be projected with some confidence, the actual configuration of the land (in terms of types of fields) is less certain the further ahead projections are made.
- In a forward planning context, it is therefore important to consider the overall land needed and to obtain suitable areas of a size and shape that allows for a range of configurations over time. The Demand Analysis Model is focused on formal sport participation. It does not include an allowance for informal sporting or active recreation areas. In summary, the modelling tool, while relying on assumptions about utilisation and capacity and externally reported participation, provides an alternative to traditional models based on ratios of land to population.
- The application of the Demand Analysis Model for this study focused on field sports (athletics/track and field, baseball, cricket, Australian football, rugby league, rugby union, soccer (football), touch football, hockey, softball and netball). Given the number of junior fields currently marked across the Council sites and within full size rectangular and oval fields, the most appropriate method of projection is to focus on the overall land available and the proportion of that land which is dedicated to the actual playing surface.
- Future population estimates developed in consultation with Council officers have been used to calculate the demand for the 2031 period. The current supply of sport land within Northern Beaches Council has been provided by Council.
- Ancillary facility needs (e.g. for buffer space, club facilities, amenities, some parking) required to make areas functional has been incorporated into the overall area calculation per facility. This means that while actual playing surface may be 1 Ha, the actual land needed is greater to allow space for parking, ancillary facilities and buffers.



- Based on test analysis of a number of locations across Qld, NSW and ACT, Otium Planning Group has found that generally for field sports the additional ancillary area required is approximately 70% of actual playing space. This is relatively consistent with current ancillary space provided in the Northern Beaches Council area, which currently has an overall ancillary rate of 75%. Therefore, total land needs are calculated as 1.7 x the playing area needed.

The table below presents the results calculated by the Demand Analysis Model for 2016 and 2031 against the current area supplied by Northern Beaches Council.

Table 6: Current and projected land surplus (Ha) based on Participation Demand Analysis Model

	2016		2031 ⁷	
	Playing Surface	Playing Surface + Ancillary (70%)	Playing Surface	Playing Surface + Ancillary (70%)
Calculated Demand (Ha)	140.5	238.9	157.9	268.4
Existing Supply (Ha)	116.5	203.3	116.5	203.3
Surplus (Deficit) (Ha)	(24.0)	(40.9) ⁸	(41.4)	(70.3) ⁹

This suggests that, based on the estimated 2016 Northern Beaches population, there is an undersupply of 40.9 Ha of land for sportsgrounds (including an allowance of 70% for ancillary areas). In terms of playing space required, the model suggests that there is a current undersupply of 24 Ha. With the Northern Beaches population expected to increase by 32,375 by 2031 these undersupplies will escalate. The Demand Analysis Model predicts that by 2031, the required space will be 70.3 Ha of which 41.4 Ha would need to be developed for playing surfaces.

7.2 Allocation Based Demand Model

The second method employed by Otium Planning Group to assess the current needs for the provision of sportsgrounds in the Northern Beaches Council area is a utilisation or allocation based demand model. This model utilises data from section 5.3 to estimate the current excess or shortfall of sportsgrounds. This analysis demonstrated that peak demand is experienced during the winter season, therefore, these figures have been used for the purpose of the model. Once again a 30-hour and 35-hour scenario have been developed.

To provide further veracity to the process, those fields identified as being ‘under booked’ were evaluated from a practical perspective in order to rule out those that cannot feasibly be improved to add capacity. This resulted in a ‘Practical Additional Capacity’ being established for each scenario which subsequently identified a ‘practical’ number of hours over capacity for each scenario. The proportion of this shortfall was then multiplied by the existing total playing area of sportsgrounds to estimate the additional area to cater for existing demand as expressed by allocated hours. This process and associated results are summarised in the following table.

Table 7: Current shortfall based on Allocation Demand Model

	30-HOUR SCENARIO		35-HOUR SCENARIO	
Total booked hours	4,997		4,997	
Total capacity in hours	3,902		4,442	
Cumulative hours of areas over benchmark	1,286		822	
Practical additional capacity hours	122		167	
Practical hours over capacity	1,164	29.8%	655	14.8%
Existing playing area (field supply)	116.5 Ha		116.5 Ha	
<i>Additional Supply Needed</i>	34.8 Ha		17.2 Ha	

⁷ For the purpose of the modelling projections to 2031 assume that current supply is unaltered.

⁸ The total land deficit is based on 1.7 x the playing area required and is not the difference between current total supply needed and existing total land area. The average current ancillary land area in Northern Beaches is 1.75 the playing area.

⁹ As above



Through this model, the current 'gap' in demand and supply of 'field hours' has been converted and expressed as a land area. This shows that under the 35-hour scenario a further 18.3Ha of sportsgrounds (i.e. actual playing areas) would be required, whilst under the 30-hour scenario a further 36.1Ha would be needed to meet current demand. This shortfall relates only to the actual playing area of the fields and does not allow for ancillary areas/ facilities.

7.3 Demand Summary

The modelling presented above indicates that there is a shortfall in the current supply of sportsgrounds in the Northern Beaches Council area of between 17.2Ha and 34.8Ha. However, when comparing the outputs of the Allocation Based Demand Model and the Participation Based Demand Model the **more likely shortfall in actual playing area is estimated at approximately 24Ha**. In addition to the actual playing area, an allowance for ancillary space needs to be made (estimated at 70%) which results in a **total land area required of approximately 40.9Ha**.

By overlaying population growth on existing supply and demand factors, a forecast demand for 2031 sees the shortfall in playing space increase to **41.4Ha** and the total land area required reaching approximately **70.3Ha**.

7.3.1 Considerations for Land Supply

If Council is able to acquire/secure additional land to help meet the demand generated by winter sports, then a number of summer sports needs (e.g. cricket, softball etc.) could be accommodated within existing (reconfigured) and new spaces to address the needs for cricket and other sports during the summer season.

A further consideration is the importance of land quality. The demand model used for the analysis assumes a consistent land quality over time. This means that if land quality declines, the model could under-estimate the area needed due to declining yield from sites secured. Additionally, for Council the risk is also that forward capital estimates will be insufficient due to increased costs of making unsuitable land functional for formal sport.

While difficult to adjust for in demand model calculations, land secured for sport is often sub-optimal, and the expectation of yield (in terms of actual playing surface) can vary greatly. Some of Council's sportsgrounds are small and only result in a few playing fields. Therefore, the aggregated sum of the land proposed to service future demand may give too optimistic an expectation of yield.



8. Addressing Current/ Future Shortfall in Supply of Sportsgrounds

As outlined at Section 7 the modelling of supply and demand indicates a shortfall in the current supply of sportsgrounds in the Northern Beaches. In addressing this shortfall the Council has a range of options that fall under three broad categories

1. Make better use of existing sportsgrounds to enable more use (increase in capacity)
2. Create more sportsgrounds
3. Review management arrangements

8.1 Possible Measures to Address Shortfall

Whilst the shortfalls in supply are expressed as land areas, a number of measures can contribute to addressing the shortfall in supply of sportsgrounds. Further detailed consideration of these measures will occur in the preparation of the Sportsground Strategy however they could include the following:

8.1.1 Make better use of existing sportsgrounds to enable more use (increase in capacity)

Options could include

- a. *Installing lighting on presently unlit sportsgrounds.* Areas suggested for consideration by sports groups include:
 - o Frank Gray Oval, Mike Pawley Oval, Passmore Reserve, Tania Park, Forestville Park
- b. *Upgrading lighting of existing sportsgrounds.* Areas suggested for consideration by sports groups include:
 - o North Narrabeen Reserve, Balgowlah Oval, Aquatic Reserve, Lionel Watts Reserve, Boondah Reserve (netball), Forestville Reserve (netball), Denzil Joyce Oval, Reub Hudson Oval, Pittwater Rugby Park, Nolan Reserve, Kitchener Reserve, Abbott Road (softball) and LM Graham Reserve
- c. *Reconfiguring existing sportsgrounds to improve functionality and usage.* Areas suggested by sports include:
 - o Balgowlah Oval (requires expansion into 9th hole of adjoining golf course), North Narrabeen Reserve
- d. *Upgrading drainage/ surface quality to improve functionality.* Improvements in drainage assists sportsground recovery after rain, reducing downtime. Areas for improvement suggested by sports groups include:
 - o Abbott Road (netball courts), Denzil Joyce Oval, Reub Hudson Oval, Nolan Reserve, John Fisher Park #3, Wyatt Reserve, Beacon Hill Reserve, Tristram Road Reserve, St Matthews Farm, Adams St Reserve, Dee Why Reserve, Seaforth Reserve, Tania Park, Forestville Park
- e. *Installing additional multi-purpose synthetic surfaces.* Shared use multi-purpose synthetic surfaces can increase the intensity of use and lessen pressure on grass fields. Geographically dispersed areas suggested for consideration by sports groups include:
 - o Lionel Watts, Cromer 2, Careel Bay, Seaforth Oval
- f. *Installing special-purpose surfaces.* These could include:
 - o A dedicated synthetic hockey surface(s)
 - o Upgrading of existing athletics track (i.e. Sydney Academy of Sport at Narrabeen, a State facility)
 - o Conversion of grass netball courts used for training to hard courts (Boondah Reserve, Forestville War Memorial Playing Fields, Lionel Watts Reserve)
- g. *Continuing to improve field maintenance and management practices to preserve and increase carrying capacities.*



8.1.2 Create more sportsgrounds

Options could include

- a. *Acquiring or securing additional land for new developments*
 - Ensure planning for new residential developments includes provision of land for active open space according to Council's open space provision requirements
 - Three sports parks each comprising double playing fields are proposed in the Draft Ingleside Precinct Structure Plan (November 2014) to provide for the active open space needs of the Ingleside precinct only
 - The Draft Warriewood Valley Section 94 Contributions Plan states that 4.15 Ha for active open space is yet to be delivered in the southern buffer zone of Warriewood Valley
- b. *Acquiring or securing other land*
 - Could include consideration of Crown land or land currently used for other purposes
- c. *Converting existing open space to playing fields (e.g. golf courses)*
 - Council has undertaken a Golf Market Assessment study. A snapshot of key findings is summarised at section 9.
- d. *Partnerships with Schools or other Institutions*
 - A number of sports are already utilising facilities on school land to assist in meeting demands (e.g. grass playing fields, netball courts, synthetic surfaces).
 - Suitable open space areas in schools could be floodlit and utilised for training to take pressure off grounds for competition
 - The Department of Education has recently prepared a draft policy on joint provision of facilities which will facilitate a greater number of Council/ Education partnership opportunities.

8.1.3 Review Management Arrangements

Options could include:

- a. *Reviewing sportsground allocation and management.* Review processes to:
 - Ensure maximum use is effectively balanced against equity of access principles
 - Establish a range of pricing strategies (e.g. link cost of use to field booking hours)
 - Establish appropriate summer and winter usage benchmarks for each field
 - Improve monitoring of actual use and associated impacts where possible
- b. *Examining New Technology.* This could include consideration of:
 - Emerging roll out synthetic cricket pitch technology
 - Booking software to maximise efficiency
- c. *Accommodating training demands away from playing areas where practical*
- d. *Encouraging sports to consider rescheduling training and competition times where practical*



9. Golf Course Analysis

A market assessment of public and private golf course provision in the Northern Beaches was undertaken for Council by GBAS. A snapshot of the findings of this study is as follows:

- The Northern Beaches has a total of 13 golf facilities (refer map at p10), 8 of which allow public access on multiple days of the week. The remainder are accessible to members and their guests only.
- Seven (7) of the 13 clubs within the Northern Beaches Council area are situated on public land. Only the golf facilities on public land, from the perspective of Council, could potentially have an alternative use.
- Over the last decade there has been an overall decline in golf club membership of 13.2% across the wider Sydney metropolitan area. This equates to an average annual decline of 1.6%.
- Of the clubs in the Northern Beaches there has been an overall decline in membership over the last decade of 10%, representing an annual average decline of 1.2%.
- The 5 private access only clubs on the Northern Beaches have performed much more strongly over this period with only a 3% decline and report membership capacities around 90+% with only limited room for new demand.
- Conversely, the 8 facilities that have a public element to them have experienced a 16% decline over the last decade representing an average annual decline of 1.9%.
- In lieu of insufficient member demand, this 'space' is being filled by public green fee demand. In recent times demand in this area has generally been flat, with no growth evident in rounds played or average green fee achieved.
- The market assessment concludes that:
 - The Northern Beaches has a high number of golf courses in total as well as a high number when assessed on a per head of population basis compared to other Sydney Local Government Areas and Sydney Planning Districts.
 - Whilst population has been growing, net club market member demand levels are slowly declining and demand is being fragmented across a number of golf courses on the Northern Beaches.
 - Whilst profits are currently being achieved at the clubs within the area of focus, they are not at a level that allows for sustained re-investment in facility infrastructure. For this to be achieved, most facilities firstly require more demand, then price growth, to materially grow profitability.
 - On the assumption that there is a sufficient mix of product to satisfy the level of golf demand that exists, and that this demand would and could be accommodated within a reduced supply pool, a reduction in supply may further assist the market to achieve greater sustainability.

The findings of the Golf Market Assessment report will be considered for the Sportsground Strategy.