

NORTHERN BEACHES SPORTSGROUNDS AND GOLF COURSES DISCUSSION PAPER

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NORTHERN
BEACHES
COUNCIL

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Message from the Administrator

Within days of the formation of the new Northern Beaches Council I was approached by the major local sports groups about the need to provide more sportsgrounds and improved facilities for sport.

I was told there was simply not enough fields for the rapidly growing player numbers and as a result players were missing out and fields were in poor condition. Council owned golf course land was put forward as an option for conversion to new sportsgrounds.

Participation rates and community needs for sport and exercise are also changing. The recent increase in media coverage of women's sport, from cricket to AFL, to netball and rugby is also increasing demand for participation by women and young girls.

Council also has a role in seeking to address the rise in childhood obesity by providing enough facilities and encouraging active sport participation.

As a supporter of sport and also an avid golfer I asked staff to review the situation and engage with the community on the options as we plan for the future of all sporting facilities on the Northern Beaches.

This Discussion Paper shows clearly that many sportsfields are wearing out from being over-allocated. Currently we have a shortfall of almost 20% of what we need, equating to 24 hectares or around 24 sportsfields. Unless we improve the capacity of our fields and provide more supply this gap will grow even wider, reaching 41 hectares in 15 years.

Yes we can improve lighting, drainage, grass condition and re-allocate the fields to the sports in highest need. We can re-allocate fields to ensure female sports receive a fairer share, we can convert playing fields to synthetic surfaces so they can be used more often and Council will take up these initiatives as a priority.

However investment in our existing fields can only do so much and will only bridge around 10 hectares of the gap between supply and demand.

Ultimately we have some choices to make:

- Do nothing and accept the shortfall in supply will continue to grow
- Buy more land
- Re-allocate existing Council or Crown land to sportsfields

This paper provides a great deal of reliable information to assist people reach an informed view and provides cost estimates of the serious options.

I cannot stress enough that Council is listening. While the facts certainly lean towards the need for urgent action no decision has been made or will be, until extensive community consultation has been undertaken.

The first step is this Discussion Paper. I invite you to take this opportunity to have your say on which options you think we should pursue.

Dick Persson AM

EXECUTIVE SUMMARY

Major sporting organisations have been telling Council for years that more sportsgrounds and new and improved facilities are needed to meet current and growing levels of demand. Groups have advocated Council review whether golf courses could be more equitably used for other sports.

We currently have:

- 122 sportsfields supplying a total playing area of 116.5 hectares to over 50,000 playing members across 17 sports
- 13 golf courses covering 453 hectares catering to over 10,000 members
- 7 of these golf courses are on public land covering 180 hectares catering to over 4,000 members.

The creation of the Northern Beaches Council provides an opportunity to develop a 15 year strategy to provide a single approach to the management and long term planning of sporting facilities on the Northern Beaches.

To inform this strategy Council engaged experts in the fields of sports planning and golf course feasibility to conduct independent analyses of the sportsgrounds supply and demand, and an assessment of golf courses.

What is the current state of our sportsfields?

Council’s external sports planners Otium Planning Group identified that:

- Sportsfields have a ‘sustainable capacity’ of 35 hours per week. This benchmark is high to support as much use as possible and when exceeded playing surfaces deteriorate, leading to dead grass and muddy or dusty conditions.
- Average usage is well above sustainable capacity, with 92 of 122 sportsfields over-used. This equates to bookings of more than 800 hours per week over sustainable capacity.
- There is a current shortfall of 24 hectares of playing area, equivalent to over 24 sportsfields, based on using all fields at sustainable capacity. This increases to 41 hectares by 2031.
- Without an increase in playing areas, sports will not be able to cater for demand and will need to continue current practices such as capping membership.

“There is a growing need for more sportsfields on the Northern Beaches.... we ask that Council look into the feasibility of redeveloping some of the underutilised public land now used for golf courses.... as some of this public land could be better utilised if redeveloped into sportsfields that can be used by multiple sports.”

*Manly Warringah Pittwater Sporting Union
September 2016*

Council’s analysis indicates that the Northern Beaches has around half or less sportsground supply than Hills Shire Council and Sutherland Shire Council as outlined in the table 1.

Local Government	Population	Hectares (ha) of sportsgrounds	Population/ha
Northern Beaches Council	266,247	116.5	2,285
Sutherland Shire Council	226,220	193.9	1,167
Hills Council	160,339	174	921

Table 1

Increasing participation rates and the need to increase activity to help address obesity

Northern Beaches sport is experiencing high growth and cannot meet demand, with increased participation especially by women, juniors and men and women in over 35 competitions. For example:

- Touch football membership has increased by over 32% in the last three years and has over 6,500 members. Touch cannot meet demand, caps the number of teams, and recently turned away 20 teams due to the shortage in sportsfields
- Australian Football League (AFL) has increased by over 26% in the last three years and has over 1,300 members. AFL has stated its growth is limited due to access to sportsfields
- Football (soccer) has increased by over 8.5% in the last three years and has over 17,600 members. Some groups cap the number of teams due to the lack of sportsfields

- Six-a-side football has grown by over 50% in the last three years and has over 3,700 members. In 2016 over 1,000 players were turned away due to the shortage of sportsfields
- Cricket has increased by over 6% in the last three years and has over 2,200 current members, with growth limited by the shortage of sportsfields
- Hockey is at capacity and there is no growth potential without more sportsfields.

Participation rates and community needs for sport and exercise are changing. The recent increase in media coverage of women's sport and increase in the opportunities for women of all ages at all levels to participate in sport, from cricket, to AFL, to netball and rugby is impacting on sports participation with forecasts indicating playing numbers will only continue to grow.

Council also has an important role in addressing the rise in childhood obesity by providing enough facilities and encouraging active sport participation. Tackling childhood obesity is one of the NSW Premier's top 12 challenges with the NSW Department of Health reporting that one in five (23.6%) children (24% of boys and 23.1% of girls) being overweight or obese, *NSW Schools Physical Activity and Nutrition Survey 2010*.

What is the current situation with our Golf Courses?

Council's external golf planners Golf Business Advisory Services (GBAS) identified that:

- There are double the courses on the Northern Beaches per head of population compared to other areas in Sydney, with one 18 hole golf course per 49,867 people across Sydney and the equivalent of one per 23,151 people on the Northern Beaches
- Member demand levels are slowly declining with a 16% decline in membership numbers over the past 10 years at public courses
- Demand is being fragmented across a number of Northern Beaches' golf courses
- Whilst profits are currently being achieved, 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.

What are our options?

The key findings of our research support the assertions of local sports groups and associations that there is a need for more sportsgrounds and new and improved facilities.

Actions to address this shortfall are:

Action 1: Make better use of existing sportsgrounds to increase availability and resilience.

Actions include:

- Improving capacity by installing and upgrading lighting, upgrading drainage, improving playing surface quality, reconfiguring sportsgrounds for multiuse, improving resource management
- Re-allocate fields to sports with highest growth and need for space and full allocation of all available sportsfield hours and working with schools or other institutions.

Action 2: Convert more existing sportsfields to synthetic to increase sustainable capacity.

This action increases sustainable capacity of fields from 35 to 54 hours a week as they can be used for longer hours and in wet weather without negatively impacting on surface quality.

We could also create more sportsfields by:

Action 3: Acquiring or securing additional private land as part of new housing developments.

Action 4: Converting existing open space to sportsfields e.g. golf courses.

Action 5: Acquiring additional land by purchasing Crown, private or other land.

Alternatively we could choose:

Action 6: Do nothing and accept the shortfall in supply.

A comparison of these actions is outlined in the following table 2 and graph 1.

Council will take up actions 1 and 2, but this will not close the gap. Northern Beaches Council will need to consider actions 3 or 4 if demand is to be met. Actions 5 and 6 are not considered affordable or acceptable.

<i>Action</i>	<i>Impact on shortfall (playing area)</i>	<i>Funding per hectare (estimate)</i>	<i>Cost to rates per household over 15 years (estimate)</i>
<i>1. Make better use of existing sportsgrounds</i>	<i>4.4 hectares</i>	<i>\$270 thousand</i>	<i>\$49 (\$3.25 pa)</i>
<i>2. Convert more sportsfields to synthetic</i>	<i>5.5 hectares</i>	<i>\$2.7-\$3 million</i>	<i>\$239 (\$15.93 pa)</i>
<i>3 Acquire and embellish additional private land as part of new housing developments</i>	<i>3.6 hectares (Warriewood)</i>	<i>\$4.75-\$5.25 million</i>	<i>\$0 (funded by new housing development)</i>
	<i>7.8 hectares (Ingleside)</i>	<i>\$6.5-\$7 million</i>	<i>\$0 (funded by new housing development)</i>
<i>4 Convert existing open space to sportsfields e.g. golf courses</i>	<i>11 hectares (example)</i>	<i>\$1.4-\$1.8 million</i>	<i>\$231 (\$15.40 pa)</i>
<i>5. Acquire and embellish additional land</i>	<i>11 hectares (example)</i>	<i>\$6.5-\$7 million</i>	<i>\$1,059 (\$70.60 pa)</i>
<i>6 Do nothing and accept the shortfall</i>	<i>Nil</i>	<i>Nil</i>	<i>Nil</i>

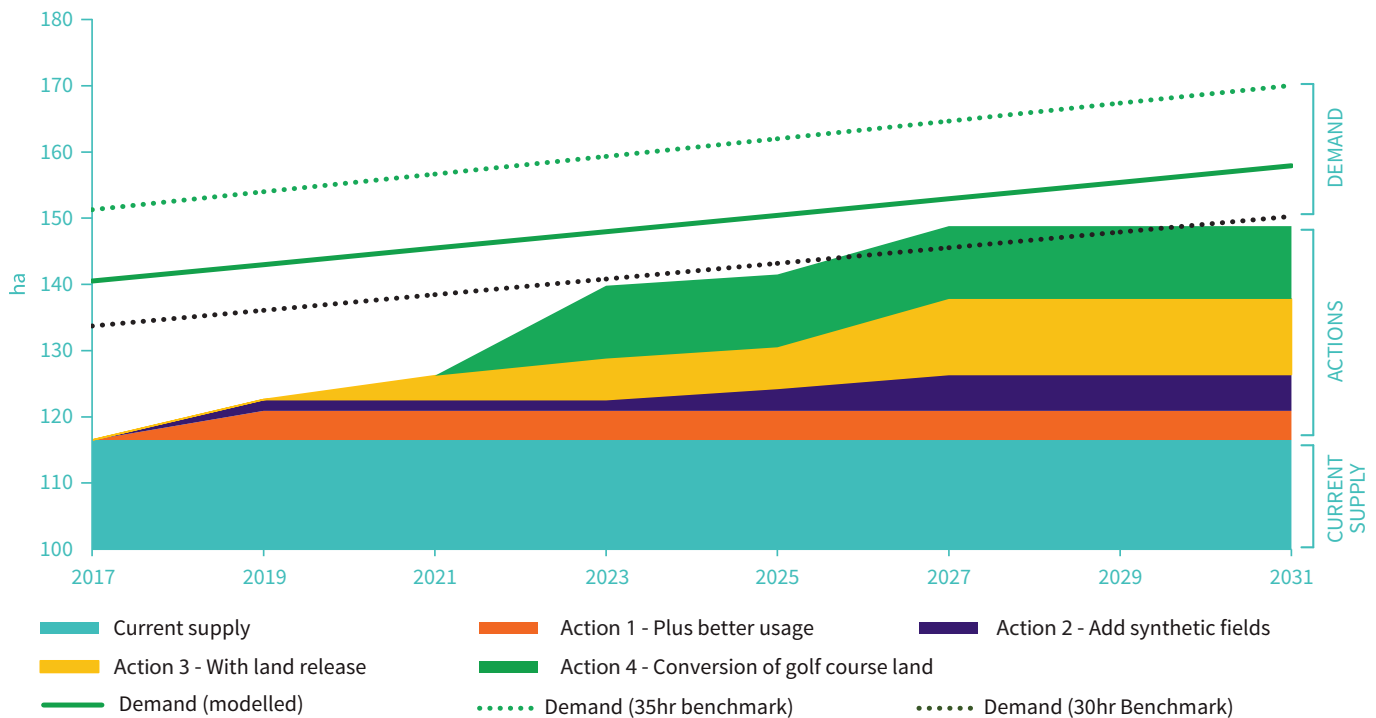
Table 2

For the purposes of this research one hectare is estimated to be equivalent to 1 sportsfield including run-off areas.

These options have been modelled over time to assess the impact on the shortfall of supply.

As can be seen from graph 1 below, the gap between supply and demand increases from 24 ha to 41 ha by 2031 with no action. Implementing the actions outlined above progressively addresses the shortfall and enables Council to substantially reduce the shortfall in supply by 2027.

Sportsfields supply and demand scenarios



Graph 1

The Proposed Way Forward

Council has a responsibility to provide sport and recreation opportunities for the community and annually budgets funds for maintenance and renewal of existing sportsgrounds and facilities.

As is clear from the analysis on above, under the potential scenario where all actions are implemented as soon as possible Council is able to substantially reduce the shortfall in supply by 2027.

However this is only possible with the conversion of 11 hectares of golf course land to sportsfields. If only actions 1, 2, and 3 are implemented there will still be a significant shortfall of supply.

The choice ultimately for the community is to:

- Re-allocate existing Council or Crown land currently used for golf to sportsfields.
- Buy more land, which has been identified as a much higher cost option.
- Do nothing and accept the shortfall in supply and a lower standard of sportsfield.

Remaining below the optimal supply and sustainable capacity benchmark (based on 35 hr per week usage) will mean playing surfaces deteriorate and are unable to accommodate everyone who wishes to play field sport on the Northern Beaches. Already major sporting groups are turning away people and this will only increase without further action.

Should conversion of some golf course land to sportsfields be supported by the community, Council would need to support effected members through a merger and could for example adjust member tee times to provide greater use of the consolidated course by the members.

Have Your Say

This Discussion Paper outlines proposed strategic directions for addressing the identified shortfall in sportsfields, including the potential for converting some golf course lands to provide for additional sportsfields, parkland and passive open space. Council will be engaging with the Northern Beaches community to discuss these options and we invite you to take this opportunity to have your say.

1. INTRODUCTION

Sport and recreation is a central part of the lives of Northern Beaches' residents.

Major sporting organisations have been calling for many years for more sportsfields and new and improved facilities, particularly now with changing and ever increasing participation rates. These groups, which represent more than 50,000 members and players, have also advocated for a review of whether some Council-owned golf course lands could be more equitably used for sport with unmet growing demand.

The creation of the Northern Beaches Council provides an opportunity for a single approach to the management and long term planning of sporting facilities on the Northern Beaches.

Council commenced work shortly after amalgamation on a long term sports facility plan - the Northern Beaches Sportsgrounds Strategy. This Strategy will guide development of sportsgrounds and facilities on the Northern Beaches for the next 15 years.

“MWFA believe that there is an oversupply of golf courses on the Northern Beaches and welcome Council’s thoughts on converting them into additional football fields to meet the footballing community’s requirements”

Manly Warringah Football Association August 2016

“...request that Council review its golf course allocation, utilisation and membership statistics to ascertain whether golf courses continue to be the best purpose for green space sporting usage within the Northern Beaches Council.”

AFL NSW/ACT October 2016

1.1 Independent Reviews of Sportsfields Needs and Golf Courses

To inform this Strategy, Council has engaged experts in the fields of sports planning and golf course feasibility to conduct independent analyses of the extent of any current and future shortfall in sportsgrounds and a market assessment of golf courses on the Northern Beaches.

This included an extensive review of relevant research and planning documents and budgets, population analysis, consultation with representatives of sporting associations, golf clubs, schools, state sporting organisations, and modelling of future demand and supply. The full reports are available online at yoursay.northernbeaches.nsw.gov.au.

1.2 This Discussion Paper – Have Your Say

This Discussion Paper presents an overview of these reviews and outlines proposed strategic directions for addressing the identified shortfall in sportsfields, including the potential for converting golf courses to provide for additional sportsgrounds and feature parkland.

Council will be engaging with the Northern Beaches community to discuss these options and we invite you to have your say.

Following consultation, the next stages of this project are as follows:

- May 2017 Draft Sportsgrounds Strategy.
- June 2017 Community engagement on the Draft Sportsgrounds Strategy.
- July 2017 Final Sportsgrounds Strategy.

2. DO WE HAVE ENOUGH SPORTSFIELDS FOR OUR COMMUNITY?

Sports planners engaged by Council, Otium Planning Group, have reviewed current usage and needs based on a benchmark of the amount of time sportsfields can be used without significant deterioration - referred to as the 'sustainable capacity' of the fields. Their Sportsground Needs Analysis report is available online at yoursay.northernbeaches.nsw.gov.au.

2.1 Review of Sportsfields - Key Findings

- a) **116.5 ha of sportsfields.** Sportsgrounds are distributed across 62 locations (see map on page 17) supplying a total playing area of 116.5 hectares and a total land area of 203.3 hectares including supporting facilities such as carparks and amenities.
- b) **Large and increasing participation.** Over 50,000 active playing members across 17 sports use sportsfields on the Northern Beaches. The sports experiencing highest growth are Australian football (AFL), football (soccer), junior cricket and touch football

“Football has again achieved record playing numbers and this is expected to continue.”

MWFA Aug 2016

“AFL is enjoying rapidly growing participation and membership.”

AFL NSW/ACT October 2016

- Touch football across NSW is growing particularly juniors. Touch on the Northern Beaches is also growing with an increase in membership of over 32% in the last three years and currently has over 6,500 members. Touch cannot meet current demand and caps the number of teams due to the shortage of sportsfields
- AFL NSW/ACT has indicated there is significant growth in AFL across NSW particularly through schools and women's competitions. AFL on the Northern Beaches has also had significant growth with an increase in membership of over 26% in the last three years and currently has over 1,300 members. AFL has stated that there would be greater growth if there was more access to sportsfields and improved facilities. Some groups cap the number of teams due to the shortage of sportsfields
- Football (soccer) on the Northern Beaches has had an increase in membership of over 8.5% in the last three years and currently has over 17,600 members. Football's growth is due to popularity across all

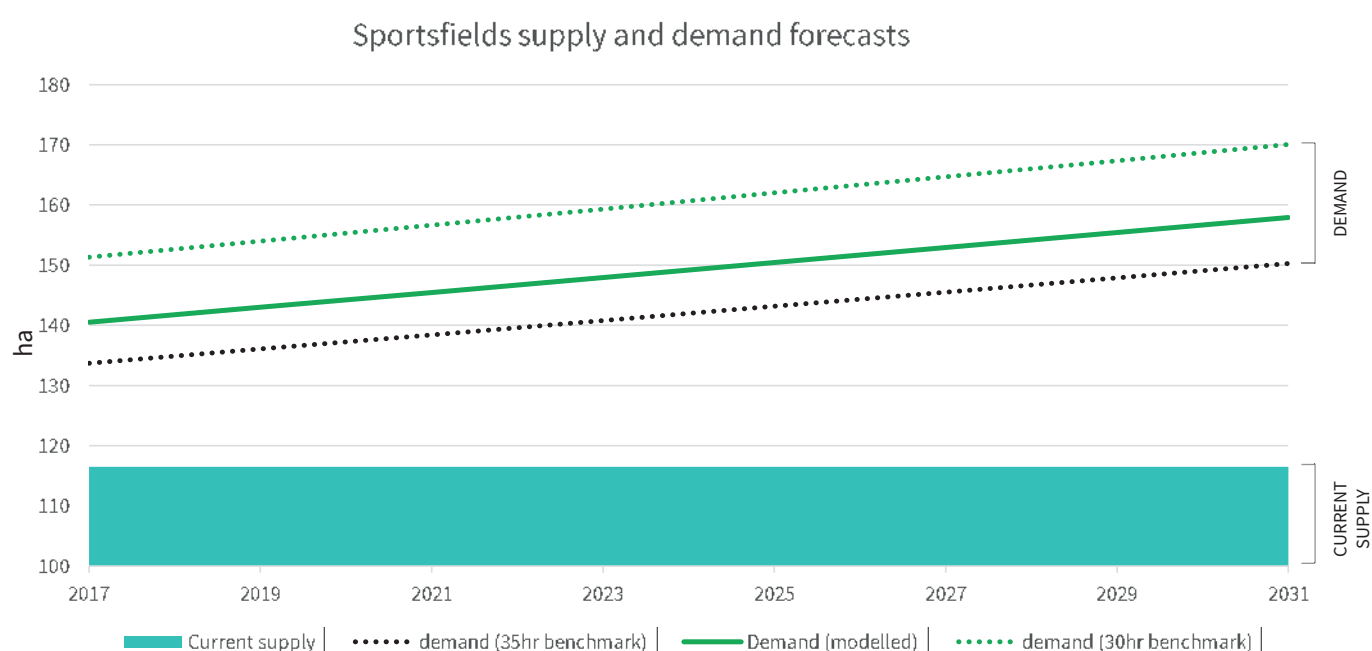
demographics particularly in women's and in over 35 and over 45 years men's competition. Some groups cap the number of teams due to the lack of sportsfields. Six-a-side football has grown by over 50% in the last three years and has over 3,700 current members. In 2016 over 1000 players were turned away due to the shortage of sportsfields

- Cricket on the Northern Beaches has had an increase in membership of over 6% in the last three years and currently has over 2,200 current members. Cricket has experienced growth in juniors and in new formats such as T20 and one day cricket. However, cricket's growth is limited by the shortage of sportsfields
- The shortage of sportsfields and lack of suitable facilities has impeded the growth of some sports including rugby league, archery, baseball, netball, softball and hockey. For example hockey are at capacity and there is no growth potential for hockey competition on the Northern Beaches without more sportsfields.
- c) **Growth of women and girls participation in sport.** Participation rates and community needs for sport and exercise are changing. The recent increase in media coverage of women's sport and increase in the opportunities for women of all ages at all levels to participate in sport, from cricket, to AFL, to netball and rugby is impacting on sports participation with forecasts indicating that playing numbers for women and girls will only continue to grow

Currently a low proportion of sportsfields on the Northern Beaches are allocated to women's sport. In the future fields will be re-allocated to ensure female sports receive a fairer share.

- d) **Sustainable capacity of sportsfields of 35 hours per week.** Sportsfield use and playing surface condition have a direct relationship. Numerous studies have investigated what is an ideal amount of use for fields if they are to be in good condition for use. Over-use or use in wet weather results in playing surfaces being in poor condition, dying or even being unfit for use
- Council, on advice from its independent expert sportsground planners, has based this analysis on a 'sustainable capacity' of 35 hours per week. This is a high level of usage for such a benchmark with many studies indicating usage should be restricted to much lower levels. The vast majority of fields are used beyond this benchmark

- Some sportsfields have a different carrying capacity. For example the synthetic playing surfaces at Cromer, Forestville War Memorial Playing Fields and Narrabeen are attributed a 54 hour carrying capacity. These variances have been considered in the research.
- e) **Average usage well above sustainable capacity of sportsgrounds.** Council's sportsfields are generally over booked when compared to the sustainable capacity benchmark of 35 hours per week
- Demand (represented by booked hours) outstrips supply (represented by total capacity) by 12.5% using a conservative benchmark of capacity that allocates more time to usage
 - Average usage is well above sustainable capacity, with 92 of 122 sportsfields over-used
 - Collectively these over-used fields are booked more than 800 hours per week greater than sustainable capacity - with 49 sportsfields booked more than 10 hours each week above capacity this is not sustainable.
- f) **Current supply shortfall of 24 ha** (equivalent to over 24 sportsfields). There is a current shortfall in supply of land for sportsgrounds of approximately 24 hectares which, when allowance for ancillary areas for parking, amenities and other facilities is included, amounts to a current shortfall of approximately 41 hectares as demonstrated by graph 2.
- Sporting associations, clubs and organisations have identified a range of sportsground and facility issues and needs including 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
 - Unlit or inadequately lit playing areas restricting availability or suitability for evening use
 - Demand for additional or upgraded facilities requiring specialist surfaces
 - Poor playing surfaces from over use, subsidence, or poor drainage
 - Inadequate provision of, or poor standard of, amenities (especially in those sports with high numbers of female participants or experiencing growth in female participation)
 - Sportsfield allocation process not maximising usage.
- g) **Projected shortfall of 41 ha by 2031** (equivalent to over 41 sportsfields). If no new land is provided to support the Northern Beaches population increase projected for 2031 and a likely increase in player participation, the current shortfall will increase to approximately 41 hectares, or 70 hectares including ancillary areas as demonstrated by graph 2.



Graph 2

The results of the analysis by Otium Planning Group of current and future demand for sportsgrounds is demonstrated in graph 2. The graph highlights a current and future shortfall in supply of land for sportsgrounds. Otium Planning Group developed two models for estimating demand for sportsgrounds, outlined in detail in their Sportsground Needs analysis report available online at yoursay.northernbeaches.nsw.gov.au.

This modelling utilised inputs including:

- Population data
- Sports participation data
- Area needed for specific sportsfields
- Capacity of sportsfields to accommodate numbers of players
- Likely peak demand hours
- The mix of lit and unlit fields
- Council's sportsground booking data and sportsground inventory
- Sustainable capacity benchmarks for usage of 30 and 35 hours a week.

“All sports on the Northern Beaches need more facilities... Cricket in particular is in dire need of improved and new facilities.”

Northern Beaches Cricket Council July 2016.

- h) **Lower sportsfield supply compared to other similar sized Sydney council areas.** Council's analysis indicates that the Northern Beaches has around half or less sportsground supply than Hills Shire Council (West Central District) and Sutherland Shire Council (South District) as outlined in the table 1.
- i) **The need to increase opportunity to be active to help address obesity.** Council also has an important role in seeking to address the rise in childhood obesity by providing enough facilities and encouraging active sport participation.
- Tackling childhood obesity is one of the NSW Premier's top 12 challenges with the NSW Department of Health reporting that one in five (23.6%) children (24% of boys and 23.1% of girls) being overweight or obese (*NSW Schools Physical Activity and Nutrition Survey 2010*)
- New and improved sportsgrounds and facilities will increase the opportunities for our community to be more active. This is particularly important for children as the Australian Sports Commission found in its *AusPlay Participation Data (December 2016)* that sport clubs are the main avenue for physical activity for both girls and boys throughout childhood.

Local Government	Population	Hectares (ha) of sportsgrounds	Population/ha
Northern Beaches Council	266,247	116.5	2,285
Sutherland Shire Council	226,220	193.9	1,167
Hills Council	160,339	174	921

Table 1

*Population data is based on current information. Sportsground data is based on: Recreation Strategy, Baulkham Hills Shire Council 2007, Sutherland Shire Council Resourcing Strategy 2013/14 – 2022/23, Sportsground Needs Analysis Northern Beaches Council 2016.

3. THE SHORTFALL IN SUPPLY WHAT ARE OUR OPTIONS?

Council invests significantly in the maintenance and improvement of our sportsfields. Council's current capital works budget for sportsfields is approximately \$2 million per year. In response to the preliminary findings of this research it is proposed in the draft 2017/18 capital budget to increase the investment for sportsfields to \$4.21 million.

Six broad actions have been identified to reduce the current and future sportsground shortfall.

1. Make better use of existing sportsfields to increase availability and resilience.
2. Convert existing sportsfields to synthetic to increase sustainable capacity.
3. Acquiring or securing additional private land as part of new housing developments.
4. Converting existing open space to sportsfields e.g. a golf courses.
5. Acquiring additional land by purchasing Crown, private or other land.
6. Do nothing and accept the shortfall in supply.

Ultimately the choice for the community is a balance between providing additional supply or accepting that sportsfields will need to be used above their sustainable capacity and hence likely to be in poor condition.

Action 1: Make better use of existing sportsfields to increase availability and resilience.

There are a range of actions for making better use of existing sportsfields including:

- Installing lighting on unlit sportsfields to increase the hours available for training and competition
- Upgrade existing lighting on sportsfields to improve quality and to light open spaces adjacent to playing areas currently unlit
- Upgrade drainage to reduce downtime after rain
- Improve playing surface quality to increase carrying capacity and recovery time after use
- Reconfigure sportsgrounds for multiuse and to maximise the number of sportsfields on a sportsground
- Re-allocate fields to sports with highest growth and need for space and full allocation of all available sportsfield hours and working with schools or other institutions
- Improve resource management and seasonal sportsground allocation practises to maximise use of

available time and areas. This could include increasing allocation hours on weekends and ensuring that underutilised sportsfields are fully allocated

- Work with sports to alter traditional training and competition scheduling and requirements to maximise use of available areas and time. This could include altering length of games, and sportsfield area requirements
- Using new technology e.g. an integrated on-line Council bookings system could enable 'real time' 24/7 bookings, reducing downtime on sportsfields by speeding up booking approvals.

Analysis indicates that 25 sportsfields are underutilised mostly due to the lack of lighting and amenities. Other reasons include poor quality of lighting, amenities and field size is inadequate. The actions listed above will result in full use of these underutilised fields.

These types of actions are considered for funding through the Council's annual budget processes. This action could be considered the status quo position.

- Funding needs: Council estimates that the shortfall in supply can be reduced by around 4.4 hectares through lighting and resource management measures, at a broad cost estimate of \$1.2 million. That equates to \$270 thousand per hectare.

In addition, Council will pursue partnerships with schools or other Institutions. This approach has been successful for example in the partnership between Council and Narrabeen Sports High School where a new synthetic sportsfield and a natural turf sportsfield was developed and is used by the school during school hours and the community at other times.

Action 2: Convert more sportsfields to synthetic to increase sustainable capacity.

Converting existing sportsfields to synthetic increases the sustainable capacity of fields from 35 hours a week to 54 hours a week as they can be used for longer hours and in wet weather without negatively impacting on the quality of the surface.

- Funding needs: Council estimates that the shortfall in supply could be reduced by around 5.5 hectares through these measures, at a broad cost estimate of \$15-\$17 million. That equates to \$2.72-\$3.1M per hectare.

We could also create more sportsfields by:

Action 3: Acquiring or securing additional land as part of new housing developments.

Council is seeking to deliver additional land for sportsfields as part of the Warriewood Land Release (with an estimated additional population of 6,618 residents) and is also proposing new sportsfields land as part of the Ingleside Land Release (with an estimated additional population of 9,500 residents). These lands can be funded through Section 94 funding from the development in the land release area as it is to provide for the incoming population.

- Funding needs: Council is planning for 4.15 hectares (3.6 hectares playing area) in Warriewood and 9.6 hectares (7.8 hectares playing area) in Ingleside. Budget estimates for the purchase and conversion of this land to sporting facilities is in the order of \$4.75 - \$5.25 million per hectare for Warriewood and \$6.5 - \$7 million per hectare for Ingleside.
- While this is funded by section 94 funds it is dependent on current property owners wanting to sell. Therefore it could be a long time before the appropriate land becomes available.

Action 4: Converting existing open space to sportsfields e.g. golf courses.

The Northern Beaches has a total of 13 golf facilities, 7 of which are on public land. Conversion of a golf course could make significant inroads into the shortfall in supply.

For example Warringah Golf Course could provide 11 hectares of additional supply as well as large areas of parkland and passive open space. As this is a Council owned facility the costs involved would be in the conversion of the land to sportsfields and exclude land purchase costs.

Should Council consider the conversion of golf courses, it is considered that issues such as membership trends, topography, financial sustainability, environmental impact of conversion and location should be considered.

- Funding needs: Based on the provision of 11 hectares of sportsfields as well as parkland and passive open space, preliminary estimates are in the order of \$15-20 million, or \$1.4-1.8 million per hectare.

Action 5: Acquiring additional land by purchasing Crown, private or other land.

Council has conducted a preliminary review of Crown land and has not identified any land viable for sportsfields. Any significant tracts of Crown land are largely fully vegetated and would require clearing to convert to sporting facilities.

Due to the significant cost as well as environmental impacts, it is not considered that the purchase of Crown land is a viable option.

The purchase and conversion of private or other land for sportsfields would also require significant investment. As opportunities arise Council would investigate the viability of purchasing private land for sportsfields based on a cost benefit analysis and comparison with investment in other community priorities.

The actions considered are summarised in table 2.

4. REVIEW OF GOLF COURSES

Golf Market Assessment Report - Key Findings & Conclusions

Golf planners engaged by Council, Golf Business Advisory Services (GBAS), have prepared a Golf Market Assessment Report (full report - yoursay.northernbeaches.nsw.gov.au). Key findings and conclusions are outlined below.

4.1 Key Findings

- a) Northern Beaches has double the courses per head of population compared to the rest of Sydney, with one 18 hole golf course per 49,867 people across Sydney and the equivalent of one 18 hole golf course per 23,151 people on the Northern Beaches.
- b) The Northern Beaches has a total of 13 golf facilities that cater for over 10,000 members. (see map, page 17). Table 4 outlines the land ownership and area of these golf facilities.
- c) Seven of the 13 clubs are located on 180 hectares of public land.
- d) Over the last decade there has been an overall decline in golf club membership of 13.2% across the Sydney metropolitan area. This equates to an average annual decline of 1.6%.
- e) 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%.
- f) The five private access only clubs 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.
- g) Conversely, the eight facilities that have a public element have experienced a 16% decline over the last decade representing average annual decline of 1.9%.
- h) 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.

4.2 Conclusion of the Golf Market Assessment Report

- 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 council areas
- Whilst population has been growing, net club market member demand levels are slowly declining and demand is being fragmented across a number of Northern Beaches' golf courses

- Whilst profits are currently being achieved, 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.

Golf Course	Land ownership	Hectares
Avalon Golf Course	Public land	13
Balgowlah Golf Course	Public land	11
Bayview Golf Course	Private land, public access	33
Cromer Golf Course	Private land	37
Elanora Golf Course	Private land	62
Long Reef Golf Course	Public land	40
Manly Golf Course	Private land	40
Mona Vale Golf Course	Public land	37
Monash Golf Course	Private land	46
Palm Beach Golf Course	Public land	8
Terrey Hills Golf Course	Private land	55
Wakehurst Golf Course	Public land	43
Warringah Golf Course	Public land	28

Table 3

“A reduction in supply may further assist the market to achieve greater sustainability.”

Northern Beaches Golf Market Assessment Report, Golf Business Advisory Services (GBAS) 2016.

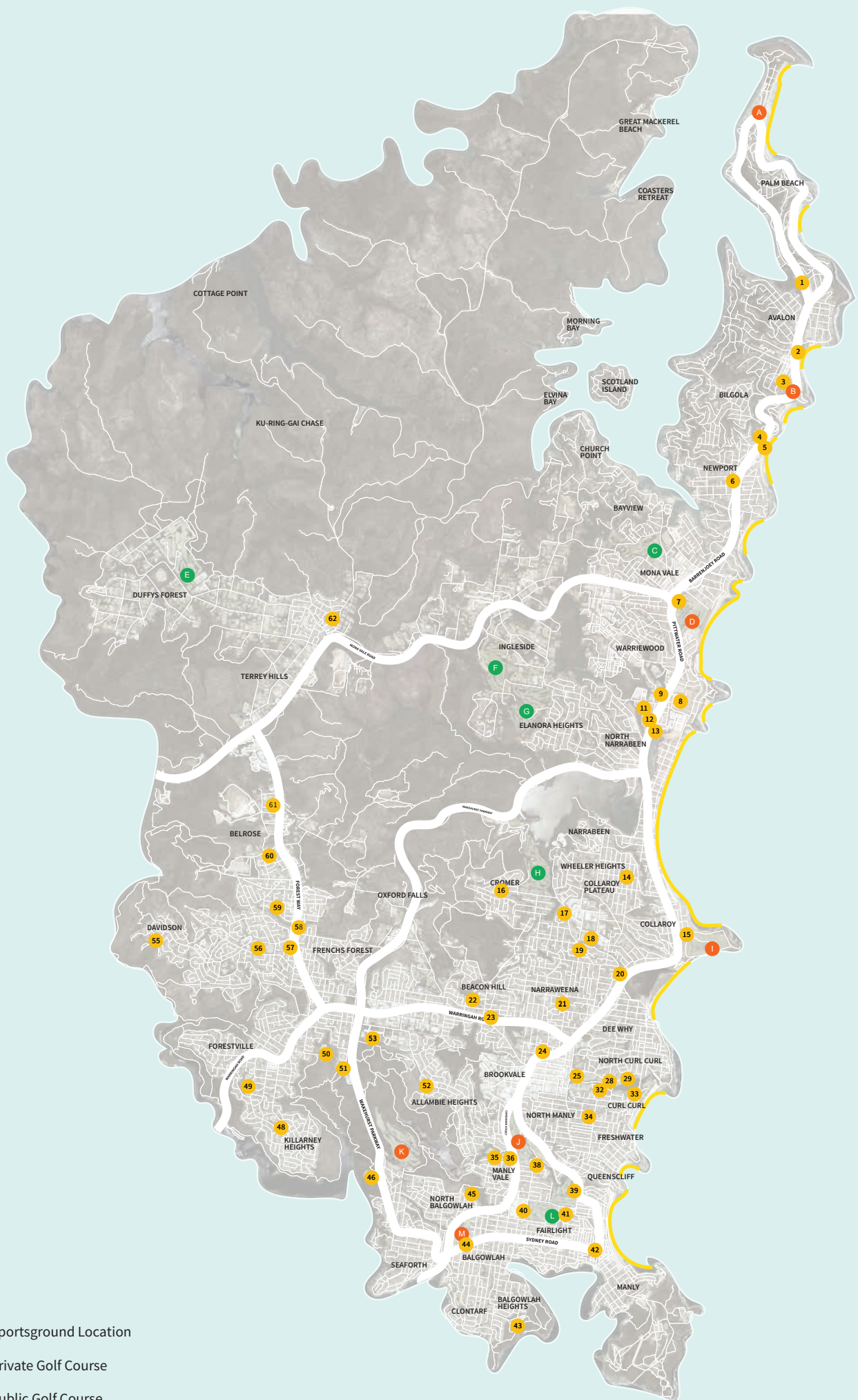


5. NORTHERN BEACHES SPORTSGROUNDS & GOLF COURSES MAP

ID	NAME	AREA (ha)	Holes
A	Palm Beach Golf Course	8 ha	9 holes
B	Avalon Golf Course	13 ha	9 holes
C	Bayview Golf Course	33 ha	18 holes
D	Mona Vale Golf Course	37 ha	18 holes
E	Terrey Hills Golf Course	55 ha	18 holes
F	Monash Golf Course	46 ha	18 holes
G	Elanora Golf Course	62 ha	18 holes
H	Cromer Golf Course	37 ha	18 holes
I	Long Reef Golf Course	40 ha	18 holes
J	Warringah Golf Course	28 ha	18 holes
K	Wakehurst Golf Course	43 ha	18 holes
L	Manly Golf Course	40 ha	18 holes
M	Balgowlah Golf Course	11 ha	9 holes

ID	NAME
1	Hitchcock Park (Incl Careel Bay Fields)
2	Avalon Beach Netball Court
3	Old Barrenjoey Road Netball Courts
4	Porter Reserve
5	Newport Beach Netball Court
6	Newport Oval
7	Kitchener Park
8	North Narrabeen Reserve (Incl Pittwater Rugby Park)
9	Boondah Road Reserve East
10	Boondah Road Reserve West
11	Warriewood Valley Sportsground
12	Narrabeen Sports High School
13	Lake Park Oval Reserve
14	Collaroy Plateau Park
15	Griffith Park
16	Truman Reserve
17	St Matthews Farm Reserve
18	Cromer Park
19	James Morgan Reserve
20	Dee Why Park
21	Beverley Job Park
22	Tristram Reserve
23	Beacon Hill Reserve
24	Brookvale Park
25	Abbott Rd Softball Ground (John Fisher Park)
26	Denzil Joyce - Reub Hudson Oval (John Fisher Park)
27	Old Reub Hudson Oval(John Fisher Park)
28	Netball Courts (John Fisher Park)
29	Abbott Road Playing Fields 3,4,5 (John Fisher Park)
30	Mike Pawley Oval (John Fisher Park)
31	Frank Gray (John Fisher Park)

ID	NAME
32	Weldon Oval (John Fisher Park)
33	Adams Street (John Fisher Park)
34	Harbord Park
35	David Thomas Reserve (District Park)
36	Miller Reserve (District Park)
37	Nolan Reserve (District Park)
38	Passmore Reserve (District Park)
39	Kierle Park
40	Manly West Oval
41	Lm Graham Reserve
42	Manly Oval
43	Tania Park
44	Balgowlah Oval
45	Condoover Street Reserve
46	Seaforth Oval
47	Bantry Reserve Oval
48	Killarney Heights Oval
49	Forestville War Memorial Playing Fields
50	Forestville Park
51	Ararat Reserve
52	Allambie Heights Oval
53	Aquatic Reserve
54	Richard Healy Playing Field
55	Macfarlane Reserve
56	Lionel Watts Reserve
57	Belrose Oval
58	County Road Reserve
59	Hews Reserve
60	Wyatt Reserve
61	Waldon Road Reserve
62	Terrey Hills Oval



6. STRATEGIC DIRECTIONS

The key findings from the Sportsground Needs Analysis report support the assertions of local sports groups and associations that there is a need for more sportsfields and new and improved facilities.

There is currently a 24 hectare playing area shortfall in supply, resulting in poor quality surfaces through overuse and at times lack of availability. This is forecast to increase to 41 hectares by 2031.

Some of the shortfall could be met with investment in existing sportsfields and conversion of fields to synthetic. However if sufficient supply is to be provided then additional land for sportsfields will be needed.

It is proposed that the order of priority for investment is as outlined in table 2.

<i>Action</i>	<i>Impact on shortfall (playing area)</i>	<i>Funding per hectare (estimate)</i>	<i>Cost to rates per household over 15 years (estimate)</i>
<i>1. Make better use of existing sportsgrounds</i>	<i>4.4 hectares</i>	<i>\$270 thousand</i>	<i>\$49 (\$3.25 pa)</i>
<i>2. Convert more sportsfields to synthetic</i>	<i>5.5 hectares</i>	<i>\$2.7-\$3 million</i>	<i>\$239 (\$15.93 pa)</i>
<i>3 Acquire and embellish additional private land as part of new housing developments</i>	<i>3.6 hectares (Warriewood)</i>	<i>\$4.75-\$5.25 million</i>	<i>\$0 (funded by new housing development)</i>
	<i>7.8 hectares (Ingleside)</i>	<i>\$6.5-\$7 million</i>	<i>\$0 (funded by new housing development)</i>
<i>4 Convert existing open space to sportsfields e.g. golf courses</i>	<i>11 hectares (example)</i>	<i>\$1.4-\$1.8 million</i>	<i>\$231 (\$15.40 pa)</i>
<i>5. Acquire and embellish additional land</i>	<i>11 hectares (example)</i>	<i>\$6.5-\$7 million</i>	<i>\$1,059 (\$70.60 pa)</i>
<i>6 Do nothing and accept the shortfall</i>	<i>Nil</i>	<i>Nil</i>	<i>Nil</i>

Table 2

For the purposes of this research one hectare is estimated to be equivalent to 1 sportsfield including run-off areas.

The modelling for funding per hectare is based on the estimated capital costs to facilitate the upgrade of existing assets or the acquisition and development of new assets. The cost to rates per household has factored the increase in recurrent expenditure over the 15 year horizon of the study period created by these new or upgraded assets such as:

- operations (e.g. electricity costs, mowing or cleaning)
- maintenance (repairs to ensure the assets can continue to deliver their intended service like replacing light globes or top dressing) and
- depreciation (the reduction in the value of the asset of the course of its life, a cost that Council must account for)

As can be seen from the graph 1 under the potential scenario where all actions are implemented as soon as possible, Council is able to substantially reduce the shortfall in supply by 2027, but only with the conversion of 11 hectares of golf course land to sportsfields. Implementation of all of these actions would enable Council to manage fields to their sustainable capacity.

The alternative is that a lower standard of sportsfields is accepted, as remaining below the sustainable capacity benchmark will mean surfaces deteriorate or are unable to accommodate everyone who wishes to play field sport on the Northern Beaches.

The impact of the option to acquire and embellish additional private land (action 5) is difficult to estimate at this time and is not included in the graph.

Council has a responsibility to provide sport and recreation opportunities for the community and annually budget funds for maintenance and renewal of existing sportsgrounds and facilities.

6.1. Converting Golf Courses to Sportsfields – Priorities and Support for Members

The Sportsground Needs Analysis report identified that one of the actions to address the shortfall in land for sportsgrounds is the conversion of public golf course(s) to

sportsgrounds. The Golf Market Assessment report also indicated that the Northern Beaches has a relatively high number of golf courses and a reduction in supply could assist the local market to achieve greater sustainability.

a) Public Golf Course Conversion

Should this action be supported by the community, Council would look at public courses based on consideration of current tenure, topography, environmental impact of conversion and location.

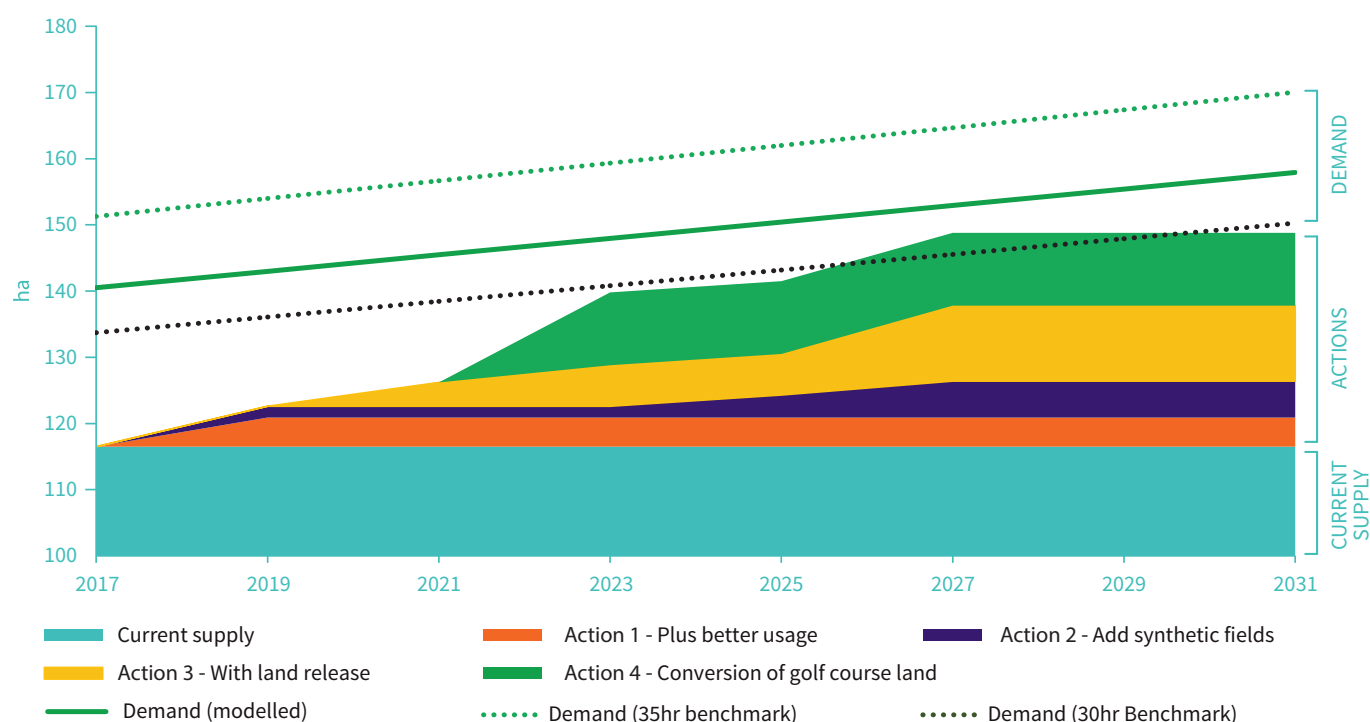
b) Supporting Mergers of Courses

Another option may also be for Council to support the merger of nearby golf courses. Options may include for example Warringah and Balgowlah golf clubs or Mona Vale and Bayview golf Clubs which are close and a merger may enable a stronger and more successful club in the long term.

c) Supporting Members

Should the conversion of golf course land to sportsfields be supported by the community of the Northern Beaches, Council would need to support members through a merger of memberships and could for example adjust member tee times to provide greater use of the consolidated course by the members.

Sportsfields supply and demand scenarios



Graph 1

7. HAVE YOUR SAY

Council is seeking feedback on the Strategic Directions proposed in this Discussion Paper and the Sportsground Needs Analysis and Golf Market Assessment reports. To find out about how to provide feedback, visit our online project page at yoursay.northernbeaches.nsw.gov.au.

On the project page you can:

- Read the Sportsground Needs Analysis and Golf Market Assessment reports and other supporting documentation
- Read the Frequently Asked Questions
- Complete an on line feedback form
- Find out about our community drop in sessions
- Join the Project Register to receive ongoing project updates.

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