

ANNEX 7 DEMAND / NEED ANALYSIS

League Requirements for Core Stadium

There are detailed requirements for new stadiums by each of the governing bodies. These have been examined. However, at this stage of the project it is only necessary to consider the essential and high level needs. The minimum requirements of the football and rugby governing bodies for progression to the next level are as follows:

- 5,000 capacity with 2,000 seats (entry to Football League)
- Freehold or 10 year leasehold interest in the ground
- 12,000 capacity (entry to Super League)
- Support facilities (the partners have indicated it would be essential to have high quality hospitality / functioning facilities and executive boxes.

It is clear that the existing stadiums used by all key partners certainly do not represent high quality facilities. There is minimal scope for improvement and all struggle to generate commercial revenue streams.

Community Uses

Over recent years, the concept of the 'living stadium' has emerged based on the principle that new community stadia should make positive contributions to local communities and the environment. If this occurs, the stadium will have more chance of being used actively by the local community, visitors and other users on non-match days. Clearly, community facilities come at a cost (and can often involve a requirement for revenue subsidies). However, there is an opportunity for the Council – and its partners – to use this project as a catalyst to enhance the quality and provision of certain community facilities in York.

Potential community sports and leisure facilities

Based on detailed discussions with Active York and a review of the city's strategic and policy guidance a long-list of potential recreational / sports uses have been considered. Table below provides an analysis of potential uses, the need / demand in the city and how appropriate they might be in supporting a community stadium in York. In summary there is a case for the provision of the following uses:

- **3G Synthetic Sports pitch:** Can be used for rugby and football. Particularly useful for training, reserve team matches and commercial use.
- **5 / 7-side pitches:** Although there is a good provision in the City (see market assessment), as part of a community sports village / well-being hub (dependent on location) there is a case for affordable / accessible pitches.
- **Water based synthetic pitch:** A clear need has been identified for the city and region. Necessary for competition standard hockey.

- **High quality grass pitches:** a shortage of grass sports pitches is identified by Active York.

All these community sports pitches could be incorporated as part as a community sports hub. The support facilities could be shared with other uses and designed around them – in particular a new athletics track. A significant site would be required to accommodate all o these uses, however they are predominantly open and could be incorporated into a green / belt or urban fringe site.

Potential community health and educational facilities

Community sports and leisure facilities are only part of the potential mix of community resources which could make up the stadium complex. In addition, healthcare, well-being and education could be anchor uses.

Education

A community stadium could play a significant role in meeting educational needs particularly in sport / health related fields. There has been a strong response from the city's educational providers, in particular 'Higher York' and 'Learning City' part of the Strategic Partnership.

Higher York believe the project has great potential in providing a strategic educational focus for sport and well being. In its letter dated 20 April 2009, St John's University outlines it support for the project. The University has academic expertise in the areas of sport, health and well-being that might be utilised to inform the planning process. It is also committed to a strategic objective to extend its external contribution through partnership and collaboration. The University of York has a strong focus on sciences and medicine, as well as an objective to improve its sporting facilities.

Learning City have identified a need for a centre of excellence to base new initiatives for 16-19 year olds Not in Education Employment or Training (NEETs). Up to 100 places per annum are required for Diplomas in Sport & Active Leisure and Society, Health & Development. York College and other providers have also identified a need for a construction skills academy and potential links to media, hospitality, groundsmanship and other related activities.

Successful models have been developed at Headingley Stadium and the KC Stadium Hull. Leeds Met University have been directly involved in the partnership redevelopment of one of the stands at Headingley stadium, providing a high-tech learning centre with multi-use teaching, conference and café facilities. Used as a focus for the internationally renowned Carnegie College it is a centre for sports excellence, using the stadium as a focal point and marketing tool. Hull College have followed a similar model in developing a new learning facility and library as part of the KC Stadium.

The new stadium could might contain state of the art facilities, creating an institute for sport and well-being. It could provide sport science, health and educational support for York's professional teams and elite athletes. It could provide facilities for

and draw on the expertise of academic staff from YSJU, York University and other local Higher Education providers who have common interests in community based sport, exercise science, health related subjects and education.

Locating an institute for sport / well-being within the stadium would bring local and regional experts together to conduct and disseminate research and provide community services which are of value to local stakeholders and the residents of York and the region. The institute may also act as an educational centre which uses sport as a mechanism to engage children with learning. It could further provide a hub for the delivery of vocationally related qualifications, thus increasing opportunities for active participation and community engagement in volunteering, whilst also raising aspirations.

In addition to the provision of high quality fit for purpose facilities, the successes of community stadia are based partly on the level of engagement with the local community to encourage participation. In many cases, the stadium management companies have created Development Plans which target groups such as local schools. Clearly, any such community engagement at the new Community Stadium could build on the existing successes of York City FC, York City Knights and the Athletics Club in engaging with local communities.

The Playing For Success (PFS) initiative has been encompassed and successfully delivered by many clubs across the UK. Funding is available to create learning spaces within stadia to encourage young people to improve their basic learning skills. Other clubs have also developed initiatives using the power of sport, with further education providers to encourage adults who often shied away from main stream education to return to courses based at a new stadium. Brighton & Hove FC have received funding from the RDA (SEDA) to develop their partnership programme with the local college.

Science City York has already made its support of the Community Stadium known via a letter of support to the Council (dated 21st April 2009). This letter states that a community stadium could offer an important role providing an ideal location for specialist exhibitions / conferences focuses on health / sports sciences. It offers the opportunity of showboating York's success and achievements in these areas.

Health and Well-Being

The PCT and hospital trust have both identified the need to invest into and find new and innovative ways of delivering many of their services. Initial consultation has identified a potential synergy with the provision of the community stadium based on case studies across the country. There is scope for further investigation for the provision of a wide range of care services including community, secondary / intermediary care and physiotherapy. There is also scope for drop-in style centres for the new health MOTs, and a hub for interventions to tackle York and the Nation's growing problems relating to health and well-being of overweight and obese children / adults.

This structure would enable a wide range of community programmes and activities aimed at increasing physical activity, engaging in preventative healthcare and leading healthy lifestyles to be delivered in the stadium, as well as in other satellite

venues. For example, the stadium might act as an information point regarding activities promoted throughout York (e.g. cycle/walk for life promotions etc).

Following the innovation identified in the comparator section of this report, by Preston North End and Warrington in their partnerships with the PCT shows that a new means of providing community health services can be provided in a very cost effective manner.

Other potential public sector facilities

There is also an opportunity to incorporate other public sector facilities into the stadium complex. These could include offices for council services (e.g., sports development, and youth services which have a clear synergy with the stadium). There is also scope to house other council services that require vehicular access and would not be well suited to the new centrally located Council HQ. Other public services could also be considered (involving the Police and Fire Service). Adding these facilities to the facility mix would both create additional footfall and vibrancy to the stadium site, and would reinforce the community-based nature of the project. However, the need and potential of these uses will need to be discussed in detail with the relevant organisations should the project move forwards.

Ancillary Commercial Uses

Hotel & Conference Centre

Unlike other major tourist destinations, York does not have a strategic framework to help guide future hotel investment and development (such as an analysis of future hotel sector supply growth and characteristics, and demand prospects). However, as mentioned previously Visit York have identified a particular strategic priority to attract high quality (4-star plus) hotel provision to York. A specific market gap has been identified for new, distinctive hotels that also offer high quality conference facilities (which include a variety of different sized conference and meeting rooms, and break-out rooms). In terms of potential locations, Visit York has suggested a preference for sites close to the city centre (with good access from the railway station).

Based on recently completed hotel market and financial feasibility analysis – in relation to different types of hotels (which include varying amounts of conference and meeting room space) – the potential capital costs per bedroom for different types of branded hotel with conference facilities could be as per the table below. As these figures exclude the cost of any land acquisition, site preparation, abnormal costs, and professional fees, they should only be regarded as indicative at this stage.

Indicative hotel development costs

Quality	Indicative capital cost per bedrooms
Branded budget hotel with between 60 and 100 bedrooms	£40,000 plus
Branded mid-market (three-star equivalent) hotel with up to 125 bedrooms	£65,000 to £75,000 plus
Branded upscale (four-star equivalent) hotel with c. 150 bedrooms	£120,000 plus

A soft market testing exercise was undertaken with four national / international hotel operators regarding their interest in the potential of a hotel as part of a community stadium development in York. Due to the commercial sensitivity of the data / names involved the specific details are not provided, but the findings are summarised below:

- All four operators expressed interest in the potential of a 3*plus to 4* plus hotel / conference facility (120-170 bed) in York as part of a community stadium.
- Based on the successful models elsewhere in the country and considering the potential gap in the market for top-end hotels in York this was of particular interest.
- Location would obviously be important as would the range of other facilities included as part of the stadium / hub.

Commercial 5-a-side

5-a-side football is a fast, intensive, and exciting and is suitable for just about any age, any ability and either sex. The popularity of this sport has led to a significant increase in supply of 5-a-side football pitches across the country over the last ten years, and it is among one of the fastest growing sports in the UK. Indeed, the Football Association found that the number of adults playing small sided games (i.e., 5-a-side and 7-a-side) now exceeds the numbers playing 11-a-side.

The provision of facilities has been revolutionised by a handful of private sector companies, including Powerleague (who have 43 centres across the UK), Goals (31 centres), and Play Football Centres (11 centres, including one at Clifton Moor Retail Park in York). These new pitches are generally state-of-art, rubber crumb pitches with clean changing facilities and other on-site leisure facilities including a licensed bar and big-screen room, as well as children's party rooms and soft play areas. Many centres offer indoor and outdoor pitches.

The Play Football Centre in York reportedly cost c. £2 million to develop. It opened in 2008, and has five 5-a-side football pitches and two 7-a-side pitches. However, given the size of the existing Play Football Centre, there are doubts as to whether a city the size and economic profile of York would generate sufficient demand for another commercially-operated 5-a-side centre.

Discussions with a leading operator undertaken to inform this study - confirmed this. They suggest that a commercial 5-a-side centre requires a resident population of 150,000 people. Given this, the existing Play Football Centre and the facilities at the new Manor School there seems to be limited scope for further commercial facilities. However, discussions amongst certain consultees did appear to suggest potential demand for a 'lower cost' 5-a-side option in the city, providing it was well located. Furthermore, if it was to be part of a major stadium development / sports village hub it may be an attractive and competitive proposition.

Multi-purpose music and sporting indoor arena

The operation of UK arenas often provides insufficient income from events and secondary sources to generate private sector interest in funding the total capital

development costs. Private sector interest has been limited without the opportunity for planning gain. The development of arenas in the UK has therefore been carried out typically via some form of public / private sector partnership, where (in some cases) the public sector has contributed land and much of the construction cost, with the private sector funding some capital and all of the operating costs. Few of the existing arenas in the UK have been constructed without significant levels of public sector grants.

It is important to highlight a major new multi-purpose arena development planned in Leeds. In November 2008 it was announced that the new Leeds Arena would be located in the northern part of the city centre (. The site covers an area of over five acres. Leeds City Council will own the land and the building, the Arena will be managed by the operator SMG. It is anticipated that the venue will have 12,500 seats and be suitable for a wide variety of entertainment and sporting events. The new venue is expected to open in 2012. This will clearly be a major new large-scale entertainment venue for Yorkshire, and given the high profile nature of the operator SMG (who is also a music promoter) is likely to draw visits from a wide catchment area, including York given the easy road and rail access between the cities.

Many stadiums (including the KC and Liberty stadiums) have successfully staged big concerts, by covering the playing surface and turning the stadium into a temporary music venue. Experience shows that this is unlikely to provide a secure revenue stream, however for occasional major concerts / festivals where their will be a positive wider impact from the event, the operating costs can be recovered.

The Barbican Centre

It is necessary to discuss the possible redevelopment of the Barbican Centre, which is located to the east of the city centre. The Barbican Centre opened in 1989. Until it closed in 2006, the Barbican Centre provided a range of arts and leisure facilities, including a 1,500 seat auditoria (which was the largest concert hall in York), and swimming pool.

In February 2009, the Council commissioned Drivers Jonas to examine possible future options for the re-use of the Barbican Centre. In April 2009, Driver Jonas produced their report which suggests market potential for a range of arts events, and conferences / exhibitions for any 'new' Barbican Centre to tap into. The Council is currently considering the report's recommendations before determining a way forward.

It is also important therefore to consider the implications of the possible redevelopment of the Barbican Centre on any new Community Stadium to ensure that the two facilities – if they both come to fruition – are as far as possible complementary, particularly in terms of any event space provided at the stadium, hotels, and conference and exhibition facilities. In terms of the latter, there will be a need to ensure that there is a strategic – destination wide - approach to the targeting of conference and exhibition markets so that they do not directly compete with each other for the same type of events, particularly if both facilities have an active involvement of the Council.

There is a great opportunity here for the city to look strategically at the provision of public leisure and tourism facilities and the commercial opportunity surrounding this. The interest of the University must also be considered in the conferencing and music venue market and their need to deliver high class sports facilities as part of their campus expansion.

Other commercial land-uses

There are clearly a variety of other potential commercial land-uses which could be considered as part of the new community stadium, including multiplex cinema, ten-pin bowling, and bars and restaurants. In terms of multiplex cinema and ten-pin bowling, there is no evidence of any latent demand. For example, multiplex cinemas typically require a catchment population of c. 150,000 to 200,000 to support a ten screen complex. Given that York already has a 12 screen Vue Cinema (at Clifton Moor) and a three screen City Screen in the city centre, there appears to be no excess demand to support additional cinema provision, even though York's population has many positive demographic attributes for cinema-going (e.g., relatively large numbers of people aged between 7 and 34 years old).

With regards to commercial food and beverage provision, key issues include (1) the level of footfall which would be generated by the next Community Stadium complex to support their trading and (2) to consider to what extent any provision on the site of the new Community Stadium would dilute the income generating potential of the stadium's own food and beverage offers. At this stage, it is not suggested to include commercial food and beverage offers as part of the wider mix of community and commercial facilities.

Analysis of community sports needs in York

Option	Description	Commentary
Indoor sports hall	<p>Flexible use indoor sports hall for a range of indoor sports and leisure activities, including badminton, dance and fitness classes, indoor sports training, and general school usage.</p> <p>A typical community sports hall would have a four badminton court hall, activity halls, and associated changing rooms and other facilities (e.g., café).</p> <p>By way of illustration only, recently built sports halls of this type have had capital costs of c. £1.5 million to £2.0 million.</p>	<p>Analysis undertaken by Active York suggests that there is currently a significant under supply of publicly accessible badminton courts across the city, which will increase as York’s population continues to grow. However, there is a possibility that some of this shortfall will be met by the following:</p> <ul style="list-style-type: none"> • Community usage agreements to offer public, casual use at existing facilities. • York University’s plans for a new sports hall as part of their expansion plans as Heslington East. • There is also the potential to develop full-sized sports halls at three of the city’s secondary schools which currently do not have such a facility, as they would make good locations for such community sports halls (e.g., they would benefit both the schools and the local communities). <p>In light of the above, we do not suggest inclusion of a sports hall in the facility mix at the new Community Stadium.</p>
Swimming pools	<p>Community swimming pool which could be a variety of different sizes, including 25 m. long, which is a standard size for many community pools. Could be available for public swimming, swimming lessons, and club usage.</p> <p>By way of illustration only, recent swimming pool projects of this type and size have been built for c. £5 million plus.</p> <p>It also important to note that community pools also typically require significant revenue subsidies, which could mean diverting funds from other potential community provision / activities.</p>	<p>Based on Active York research, there is currently an under supply of swimming space in York, which will only increase as the population of York continues to increase.</p> <p>The city has no swimming pool facilities that meet modern competitive requirements or dedicated training pool facilities. Active York suggest that there is a need for a county standard pool (e.g., 25 m. with eight lanes and training / teaching pool), particularly in the East or South of the city. However, a county standard pool is proposed as part of York University’s expansion plans.</p> <p>Because of the above, we do not suggest inclusion of a swimming pool in the facility mix at the new Community Stadium.</p>
Community health and	Could be a ‘low cost’ entry (when compared to private sector health and fitness club provision in	Active York’s analysis – based on national participation and membership benchmarks – indicate that there is currently no unmet demand for health and fitness facilities in York.

fitness centres	York). Could provide a gym (with cardiovascular equipment), studios, and spa facilities (e.g., steam and sauna rooms, and spa treatment rooms).	<p>Also, experiences from other community stadia (e.g., Doncaster’s Keepmoat Stadium) suggest operating community-based health and fitness clubs of this type can be challenging (even if they are of a high quality with an affordable pricing policy), at least during the first few years of trading.</p> <p>In light of this, even though York has higher than national average numbers of fitness gym members (primarily because of its generally wealthy population), we do not suggest the inclusion of a community health and fitness centre in the facility mix at the new Community Stadium.</p>
Outdoor sports pitches	Pitches which could be used for training for York City FC and York City Knights (including for their junior / academy teams), as well as community use, including schools.	<p>Research undertaken by Active York found that York has a shortage of mini / junior football pitches, and junior rugby league pitches. Active York also identified the problem that many of the existing pitches and supporting facilities (such as changing rooms) are of insufficient quality for their intended uses.</p> <p>In addition to the community need for new outdoor sports pitches, outdoor pitches clearly complement the Community Stadium as a venue for professional football and rugby league (e.g., the ability for the clubs to use the pitches for training, reserve games, academy uses, etc.).</p> <p>Because of these features, there is a case for the inclusion of high quality outdoor sports pitches at the new Community Stadium.</p>
Synthetic sports pitches	<p>Pitches which could be used by community football – including 5-a-side – and hockey (e.g., City of York Hockey Club), as well as school use. The options for the pitch include ‘traditional’ sand and water-based Astroturf synthetic pitches, or the latest 3G pitch.</p> <p>By way of illustration only, synthetic pitches can cost c. £450,000 to £650,000, depending on the quality of the synthetic turf used, the costs associated with site preparation, quality of floodlights and fencing, and the like.</p>	<p>At face value, the current supply of Astroturf pitches meets current supply (i.e., using Sport England supply / demand benchmarks).</p> <p>However, hockey participation is higher in York than the national average (as discussed in Chapter 3 of this report), and the City of York Hockey Club is keen to grow and compete at a regional level and higher.</p> <p>In light of this, there is a particular need for a new water-based synthetic pitch to meet their requirements (or any synthetic surface that supersedes this and its allowable for competitive hockey).</p> <p>There is a case for the inclusion of high quality synthetic pitches at the new Community Stadium, possibly a water-based Astroturf pitch for hockey and football usage, and a 3G pitch for use by the professional sports clubs and the local community.</p>

