

The City of Norwood, Payneham & St Peters

Swimming Centre Review
Market Research Report
July 2015



Prepared by SGL Consulting Group



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1 INTRODUCTION

This chapter introduces the report and includes a background to the swimming centres review, the study objectives and summarises the methodology used.

1.1 Background

The City of Norwood, Payneham & St Peters own and operate two swimming facilities – the Norwood Swimming Centre, located in Kensington and the Payneham Swimming Centre, located in Felixstow.

The physical condition of the Swimming Centres is a significant issue for the Council, with the appearance and dated design limiting the Council's ability to attract participants or meet the Council's broader financial objectives.

The Norwood Swimming Centre opened in the Swimming Season of 1956-1957 and the Payneham Swimming Centre opened ten (10) years later in the 1967-1968 Swimming Centre. A review of the Centre's Swimming Infrastructure was undertaken in 2008, with the condition of both facilities being assessed as "average" and major pipe work at both facilities will be required in the near future. The infrastructure at both Swimming Centres is nearing the end of its functional life however the Council has been reluctant to expend significant amounts to upgrade facilities, while there has been uncertainty around the future direction for the swimming centres. The condition of the facilities increases Council's exposure to risk in terms of patron safety, environmental performance and increased operational costs to the Council.

Coupled with this, competitive pressure is being felt from;

- the recent redevelopment of the Tea Tree Gully facility;
- the redevelopment of the Burnside Swimming Facility;
- the redevelopment of the Campbelltown Leisure centre, which incorporates a 25m indoor swimming pool;
- the redevelopment of the Adelaide Aquatics Centre;
- the preference for indoor venues with a variety of leisure opportunities; and
- increasing customer expectations of aquatic leisure facilities, with features like water slides and leisure water impacting on decisions to use a certain facility.

Consequently, the Council has commissioned a comprehensive review of its swimming facilities.

1.2 Study Objectives

The overall purpose of the Swimming Centres Review which has been commissioned is to develop a long term strategy to ensure that:

- the Council's Swimming Centre assets are managed, maintained and developed in such a way that will effectively meet the current and changing needs of the community; and

- the ratepayer subsidy is maintained at current levels or reduced over the next five (5) years.

The primary objectives of the Review, is to undertake a complete assessment of the management and operation of the Councils Swimming Centres and the current and projected costs to operate the two Centres including:

- The feasibility of the Council operating two Swimming Centres in their current form (i.e. no improvement in service levels, amenity or programming), into the future.
- A strategy that considers the lifecycle of the Swimming Centre's and provides costing's for future upgrading, capital works and scheduled programmed maintenance costs. This strategy should incorporate innovative new designs/technologies and environmentally sustainable practices as appropriate.
- A strategy that considers the strengths and weakness of each Swimming Centre to determine how best to maximise the utilisation of each facility. (i.e. new and innovative ways of programming)
- A strategy that incorporates community capacity building and the current and future community needs associated with swimming pools and aquatic recreation.
- A marketing or promotional strategy to increase usage at the Swimming Centres.
- Incorporate appropriate management structure, which considers the Council's corporate goals, asset plans, recreation plan, Work Health & Safety (WHS) requirements and risk management issues.

1.3 Methodology

The Swimming Centres Review was undertaken in five phases and the following tasks:

Phase 1: Project Inception

Project Inception Meeting

Document Review

Phase 2: Data Collection

Operational Audit

Review Asset Condition Report

Key Stakeholder Interviews

Population/Participation Analysis

Competitive Analysis

Market Research

Phase 3: Gap and Demand Analysis

Gap Analysis

Demand Assessment

Phase 4: Development Options

Leisure Facility Trends

Benchmarking

Options Report

Presentation

Phase 5: Aquatic Strategy

Preliminary Draft Aquatic Strategy

Working Group Presentation

Community Engagement

Final Report



2 EXISTING FACILITIES

This chapter provides an overview of existing facilities, their condition and results of investigations into water leaks.

2.1 Swimming Centres

2.1.1 Norwood Swimming Centre

Background

Norwood Swimming Centre, located at Phillips Street, Kensington, was built in 1956 and officially opened by Sir Thomas Playford on 23 February 1957. The land was donated to the Council for the purpose of building a pool and construction of the pool was made possible through public donations and Council assistance.

It was the first outdoor chlorinated swimming centre built in the Adelaide metropolitan area and in recognition of this; the Council has designated it as a Local Heritage Place.

Poor management and inadequate maintenance during the early to mid-1970s resulted in the closure of the pool in 1976. Following community concern and a subsequent public meeting which was held in January 1977, the pool re-opened on 4 February of that year. Attendances of less than 20,000 during the early 70s increased to 28-30,000 within a couple of years following its re-opening.

In August 2000, the Pool was designated a Local Heritage Place. In this respect, the original form of the building, its setting and all associated original building fabric, as viewed from the road are listed.

Facilities

It is an outdoor, gas heated, seasonally operated pool, comprising:

- Main pool is 50.4m by 12m, orientated in the north-south direction and constructed of reinforced concrete. The northern end of the pool is 3 metres deep and the southern end 1 metre deep. The northern end of the pool has a diving basin.
- 13m x 6m Learners/Toddlers Pool with shade sails.
- Aged buildings which include an entry/foyer, office, kiosk, change rooms, plant room, first aid/staff room, plant room, store rooms.
- Large gum trees and elevated lawns.

Norwood Swimming Centre is listed as a Local Heritage Place.

2.1.2 Payneham Swimming Centre

Background

The Payneham Swimming Centre on O G Road, Felixstow, is located on Council land and was constructed 1967.

In addition to traditional swimming activities, the Payneham Swimming Centre has offered gala days, jazz bands, fun runs, volleyball, canoe polo, giant inflatable toys, live radio broadcasts and fire-fighting demonstrations in an attempt to improve its patronage and provide diversity.

A range of refurbishment projects have been undertaken to maintain the infrastructure in good order. These include the complete retiling of the main pool, the installation of stainless steel fixtures, the addition of steps into the shallow end of the Pool and the erection of large shades over the pools. In 2005, the Centre was renovated with an enclosed, air conditioned foyer, upgraded change rooms, a new disabled change room, landscaping and rendering of the exterior of the main building in an attractive contemporary colour.

Facilities

It is an outdoor, gas heated, seasonally operated pool, comprising:

- Main pool is approximately 50m by 18m and is orientated in the north-south direction. The pool is constructed of reinforced concrete. The northern end of the pool is 1.8 metres deep and the south end 0.9 metres.
- Learner's pool is 13 metres long by 9 metres wide and is orientated in the east-west direction. The pool is generally 0.9 metres deep and has shade sails.
- Toddler's pool is approximately 14 metres long by 8 metres wide and is orientated in the north-south direction. It is generally 0.6 metres deep and has shade sails.

2.2 Condition Audit

Prepared in June 2007, the report recommended works at each Swimming Centre.

2.2.1 Payneham Swimming Centre

Total cost (2005-2006 costs) of recommended works was estimated at \$1,472,430. The recommended works and progress to date are set out below:

Area	Task	Progress
Main Pool:	▪ Replace delaminated tiles ▪ Replace and inspect control joints ▪ Maintain shade structure	▪ No action ▪ Remedial works to control joints have been undertaken ▪ Completed
Toddlers Pool:	▪ Replace tiles ▪ Inspect pool structure when tiles replaced ▪ Replace and inspect control joints ▪ Maintain shade structure	▪ Completed ▪ Completed ▪ Completed ▪ Completed
Wading Pools:	▪ Replace tiles ▪ Inspect pool structure when tiles replaced ▪ Replace and inspect control joints ▪ Maintain shade structure	▪ No action ▪ No action ▪ No action ▪ Completed

Area	Task	Progress
Water Filtration and Treatment System:	- Replace all main pipework, valves and filter feed pump - Inspect internal; condition of ballast tanks - Major leak in dirty backwash storage tanks connecting pipework requires rectification	70% pipework completed - Completed - No action
Site Services:	- Modify gates and fence line. - Lighting levels be measured	- No action - Assume work complete

The commencement of the 2010-2011 Swimming Season was delayed due to remedial works required to address water leakage at the Payneham Swimming Centre.

In May 2013, a review of the pool infrastructure found the facility was losing approximately 68.4m³ per day (64,000 litres per day) throughout the entire system. The suspected sources of the leakage was the 50m Pool shell and the Toddlers Pool, with the 50m Pool losing approximately 45 m³ per day under static conditions. The Toddlers Pool was deemed the least efficient losing approximately 28% of its volume each day under static conditions. The Learners Pool appears to be in the best condition.

The findings of the review were that;

- The Balance Tank was assessed as being in reasonable condition.
- Valves at each outlet from the filter to be tested for water tightness. Any leaking or defective valves should be repaired or replaced. Once the valves have been repaired/replaced, the filter should be tested.
- Losses in the 50m Pool can be attributed to faults or failures in the waterproofing of the control joints.
- The Learners Pool is in good condition. No works were necessary.
- Toddlers Pool is severely dilapidated and requires replacement.

The report recommended to ensure that the water leakages were reduced to an acceptable level that the Council;

- replace the Toddlers Pool with child's water playground/splash pad;
- refurbish 50m Pool construction and tile movement joints; and
- replace valves in balance tank and test open bed sand filters.

A further review was undertaken in December 2013, and reported on and developed remedial works strategies to reduce the water loss.

The review concluded that:

- Joints in the floor of the main pool shell represent the significant sources of water leakage plus the potential for water loss through the area of the pool shell adjacent the control joints, however, with the pool tiles in place at the time of the review, this was unable to be confirmed as a source of leakage.
- The Learner's pool was not expected to have significant water losses.
- The Toddler's pool was considered beyond cost effective repair.

The recommended remedial works for the Payneham Swimming Centre were:

- Replacement of the joint sealants in the main pool.

- 2 Replacement of the toddler's pool with a new toddler's pool or children's water playground.

Re-grouting of the 50 m pool was undertaken prior to the start of the 2014-2015 season.

2.2.2 Norwood Swimming Centre

Total cost (2005-2006 costs) of recommended works was estimated at \$625,597. The recommended works and progress to date is set out below.

Area	Task	Progress
General Site:	▪ Repair perimeter fence ▪ Replace gas BBQ ▪ New tanks required for trade waste discharge ▪ Access to comply with AS1428.1	▪ Assume work complete ▪ Assume work complete ▪ Completed ▪ No action
Main Pool:	▪ Replace delaminated tiles ▪ Replace control joints ▪ Mild steel flanges replaced with stainless steel fixings and flanges	▪ No action ▪ Remedial works to control joints undertaken ▪ No action
Water Filtration and Treatment System:	▪ Replace all main pipework, valves and filter feed pump ▪ Inspect internal; condition of ballast tanks ▪ Major leak in dirty backwash storage tanks connecting pipework requires rectification	▪ 20% - 30% of pipework replaced ▪ No action ▪ Completed
Grandstand:	▪ Remove or replace grandstand	▪ Completed

The commencement of the 2012-2013 Swimming Season was delayed due to remedial works required to address water leakage at the Norwood Swimming Centre.

A review undertaken following the remedial works found a significant reduction in the rate of water leakage has occurred since remedial works were undertaken to the pool shell, with an estimated 63% reduction in the leakage rate. This is indicative of the effectiveness of the works and highlights the importance of future works to further reduce leakage issues.

The Report recommended the following works to be undertaken immediately after the conclusion of the 2012-2013 swimming season:

- 1 Further investigation should be conducted into the waterproofing of the obsolete filtered water return line that runs longitudinally down the centre of the pool.
- 2 Lights built into the east and west walls of the pool are no longer water proof. It is recommended that the lights be removed and penetrations in the pool walls filled with reinforced concrete.
- 3 The pool wall/floor junction construction joints were refurbished prior to the commencement of this season. The remaining construction joints be refurbished in a similar process to that used successfully for the wall/floor joints already completed.
- 4 Further investigation be conducted to determine the efficiency of the current filtration

pipework system in order to identify possible improvements and to check compliance with current pool operating standards and statutory requirements for water turnover.

- 5 The diving platform is non-compliant with current standards and requires replacement.
- 6 Major works undertaken to the pool creates a requirement for the inclusion of dignified disabled access to the pool. Installation of a disabled lift is recommended.

In October 2013, a report was commissioned to investigate water leakages at the Norwood Swimming Centre's main pool and reported on and developed remedial works strategies to reduce these losses. Investigations were carried after remedial works were undertaken to reduce the water losses prior to the start of the 2012-2013 swimming season. This report summarises a static test undertaken on the pool after completion of the 2013-2014 swimming season. The cumulative loss rate from the pool was calculated as 67m³ per day. This compares with the cumulative loss rate from a static test undertaken in September 2013 of 70m³ per day.

The Report found "the options for remedial works range from the minimum that will minimise the risk of water leaks from the current sources of the leaks in the scum gutters and the soiled water trenches but will have preventive effects in reducing the risk of leaks in the parts of the scum gutters and soiled water trenches not currently leaking to options that will minimise the risk of leaks from the scum gutters and soiled water trench to an options that will minimise the risk of leaks, remove potential future foreseeable sources of leaks and improve the quality of the swimming experience in the pool by better water circulation and removing the filtered water return line from the western wall".

Additional testing was undertaken in November 2014. Remedial work options recommended were:

- Southern wall displaced tiles
- Seal joints between scum gutters and scum gutter lines
- Replacement of scum gutter lines
- Replacement of the scum gutter lines and the scum gutters
- Local repair of soiled water trenches
- Lining of the soiled water trenches
- Abandonment of soiled water trenches
- Relocation of filtered water return line to the soiled water trench
- Filling in wall penetrations
- Filling in pit adjacent diving board

Water proofing work was undertaken prior to the commencement of the 2014-2015 season. Following the 2014-2015 season, further testing of the pool structure indicated that the cumulative loss rate from a static test remains relatively constant at 71m³ per day

2.3 Summary

Norwood Swimming Centre was opened in 1957. It was the first outdoor chlorinated swimming centre built in the Adelaide metropolitan area and in recognition of this, the Council has designated it a Local Heritage Place. In this respect, the original form of the building, its setting and all associated original building fabric, as viewed from the road are listed.

The Norwood Swimming Centre comprises two outdoor, heated pools. The main pool is

50.4m by 12m plus a learners/toddlers pool with shade sails.

The Payneham Swimming Centre was constructed 1967 and comprises a main pool (50m by 18m), a learner's pool and toddler's pool.

Condition audits of both Centres in 2007 recommended that works at a cost of \$625,597 and \$1,472,430 to Norwood and Payneham respectively is required to maintain the current service levels.

Investigations into water leaks at both Swimming Centres recommended:

Norwood

Works to the southern wall tiles, seal scum gutter joints, soiled water trenches, return lines, filling in wall penetration and pit adjacent to diving board.

Payneham

- Replacement of the joint sealants in the main pool.
- Replacement of the toddler's pool with a new toddler's pool or children's water playground.

Given the age of the pool and associated infrastructure, water leakage is to be expected. Similar issues have been experienced with pool of the same age which was constructed throughout South Australia.

The Council has factored the cost of repairing its infrastructure to the existing standard into its Long Term Financial Plan. One of the objectives of the Review, however is to determine whether any other renovations, in addition to the repairs should be undertaken to enhance the facilities and provide more contemporary facilities and in turn enhanced services and programs which will in turn improve the long term viability of the Centres.



3 OPERATIONAL PERFORMANCE

This chapter presents information on how the Norwood and Payneham Swimming Centre are operated.

3.1 Annual Reports

Significant items in the Annual Reports to the Council, prepared by the Manager, Swimming Centres, for the 2012-2013 and 2013-2014 season are summarised.

3.1.1 2012-2013 Report

- In the 2012-2013 swimming season, the Swimming Centres had a combined operating deficit of \$0.313m.
- Despite the shortened season at both Swimming Centres, total revenue for the season was up 7.9% on the 2011-2012 Swimming Season, driven by income generated from swimming lessons from both Swimming Centres.
- The Norwood Swimming Centre season opening date was 17 November 2013, due to the need to undertake remedial work to the infrastructure. As a result of the delay in the season opening, the overall attendances of 37,152 patrons for the season were 4,753 patrons down on the 2011-2012 Swimming Season.
- The Payneham Swimming Centre opened on 20 October 2012, a delay of one week compared to the 2011-2012 Swimming Season. Overall attendances at the Payneham Swimming Centre were 83,701, an increase of 10,201. The increase in attendances was predominately due to an increase in school bookings, providing 6,363 patrons above the 2011-2012 Swimming Season.
- School swimming lessons at the Payneham Swimming Centre are at near capacity, however there are issues with insufficient pool space to cater for the number of younger students being taught in the learner's pool at any one time, as there is no space for available for public in the learner's pool during lesson times.
- Norwood Swimming Centre provides pool space for Education Department swimming lessons for students in Year 4 through to Year 7. Lessons for Reception to Year 3 students are not conducted due to insufficient shallow pool space.

3.1.2 2013-2014 Report

- In the 2013-2014 Swimming Season, the Swimming Centres had a combined operating deficit of \$0.440m.
- Total revenue for the season was 11.1% up on the 2012-2013 Swimming Season, primarily due to income generated from swimming lessons at both Centres. Both Swimming Centres benefited from the early closure of the Burnside Swimming Centre. Patronage and ticket book sales increased at the Norwood Swimming Centre. The Payneham Swimming Centre benefited through an increase in school attendance.
- Norwood Swimming Centre attendances were 42,560, an increase of 5,408 on the 2012-2013 Season. The early closure of the Burnside Swimming Centre on 2 February 2014 provided an opportunity for the Norwood Swimming Centre to increase

attendances, particularly for lap swimmers.

- Payneham Swimming Centre attendances were 88,189, an increase of 4,488 from the 2012-2013 Season. The increase was predominantly due to an increase in school attendances and swimming lessons, which increased by 1,540 and 661 attendances respectively.
- Revenue from swimming lessons was \$37,806 at Norwood Swimming Centre, an increase of 20% on 2012-2013.
- Revenue from swimming lessons at Payneham Swimming Centre was \$82,269. As swimming lessons are at capacity for the Payneham Swimming Centre, there has been minimal growth in revenue compared to the 2012-2013 Swimming Season.
- Over recent years, the emphasis has been on building successful swim schools at both the Norwood and Payneham Swimming Centres. It has resulted in a significant increase in swimming lesson Income to \$120,074 compared to \$82,219 in 2012-2013, an increase of 46%.

3.2 Financial Performance

Tables 3.1, 3.2 and 3.3 summarise the financial performance of the Norwood and Payneham Swimming Centre for the previous six years. Key points to note from the tables are:

- Both pools have increased income and expenditure over the last six years. Whilst income growth at the Norwood Swimming Centre has increased by 56%, compared with 43% at the Payneham Swimming Centre, expenses have increased at a greater rate at Norwood compared to Payneham.
- The combined operating loss has increased by \$177,858 or 68% over the six years, to \$440,189.
- Norwood and Payneham had operating losses in 2014 of \$246,393 and \$193,796, respectively.
- At Norwood general admission and passes account for 61% of revenues in 2014, compared with 45% at Payneham. Substantial proportional increases have occurred in swimming lessons at both pools.
- Employee expenses have increased over the six years by 36% and 40% at Norwood and Payneham, respectively. However, materials, contracts and other expenses have increased by 174% and 74% at Norwood and Payneham, respectively.
- Massive increases in energy and water costs have occurred at both pools (\$55,348 and \$125,080 at Norwood and Payneham, respectively). It is understood the increased water costs at Norwood were due to water leaks and the charging rate. At Payneham the fluctuation in water costs were due to a faulty water meter in 2012.

Table 3.1: Combined Financial Performance 2009 – 2014

	2014	2013	2012	2011	2010	2009
Income						
Norwood	\$187,423	\$148,618	\$153,234	\$151,641	\$151,901	\$120,231
Payneham	\$371,396	\$354,021	\$309,753	\$274,591	\$337,823	\$260,392
Total	\$558,819	\$502,639	\$462,987	\$426,232	\$489,724	\$380,623
Expenses						
Norwood	\$433,816	\$343,785	\$367,878	\$343,368	\$297,286	\$268,778
Payneham	\$565,192	\$498,213	\$450,488	\$458,607	\$475,217	\$374,176
Total	\$999,008	\$841,998	\$818,366	\$801,975	\$772,503	\$642,954

	2014	2013	2012	2011	2010	2009
Profit/(Loss)						
Norwood	(\$246,393)	(\$195,167)	(\$214,644)	(\$191,727)	(\$145,385)	(\$148,547)
Payneham	(\$193,796)	(\$144,192)	(\$140,735)	(\$184,016)	(\$137,394)	(\$113,784)
Total	(\$440,189)	(\$339,359)	(\$355,379)	(\$375,743)	(\$282,779)	(\$262,331)

Table 3.2: Norwood Swimming Centre Financial Performance 2009 – 2014

	2014	2013	2012	2011	2010	2009
Income						
Hall and Equipment Hire	\$9,269	\$7,316	\$8,266	\$8,010	\$6,398	\$6,655
Swimming Lessons	\$37,806	\$31,664	\$23,636	\$21,002	\$14,042	-
Sundry Income	\$3,816	\$2,918	\$3,849	\$3,809	\$3,160	\$2,094
General Admission Fees	\$68,825	\$53,151	\$53,934	\$51,129	\$70,149	\$61,832
Voucher/ Season Passes	\$46,346	\$30,552	\$38,087	\$36,575	\$32,297	\$27,331
School and Vac Swim	\$21,361	\$23,017	\$25,462	\$31,116	\$25,855	\$22,319
Total Income	\$187,423	\$148,618	\$153,234	\$151,641	\$151,901	\$120,231
Employee Expenses						
Superannuation	\$24,656	\$21,540	\$25,419	\$20,322	\$17,940	\$17,550
Salaries & Wages	\$239,413	\$181,748	\$213,583	\$232,979	\$212,799	\$190,608
Employee Leave	\$17,869	\$32,516	\$24,980	\$7,235	\$11,590	\$0
Workers Compensation	\$11,455	\$11,710	\$10,290	\$9,431	\$9,409	\$8,343
Income Protection	\$2,755	\$2,587	\$2,488	\$2,157	\$2,595	\$1,984
Sub Total	\$296,148	\$250,102	\$276,759	\$272,124	\$254,332	\$218,486
Materials, Contracts & Other Expenses						
Energy	\$53,210	\$33,007	\$42,372	\$35,435	\$5,603	\$21,270
Water	\$18,593	\$17,353	\$17,191	\$8,986	\$6,400	\$4,815
Parts & Consumables	\$26,926	\$17,428	\$17,979	\$13,682	\$13,106	\$11,702
Other Expenses	\$38,939	\$25,895	\$13,577	\$13,141	\$17,845	\$12,505
Sub Total	\$137,668	\$93,683	\$91,119	\$71,244	\$42,954	\$50,292
Total Expenditure	\$433,816	\$343,785	\$367,878	\$343,368	\$297,286	\$268,778
Profit / Loss	(\$246,393)	(\$195,167)	(\$214,644)	(\$191,727)	(\$145,385)	(\$148,547)

Table 3.3: Payneham Swimming Centre Financial Performance 2009 – 2014

	2014	2013	2012	2011	2010	2009
Income						
Hall and Equipment Hire	\$41,231	\$38,686	\$25,540	\$25,425	\$25,720	\$21,417
Swimming Lessons	\$82,269	\$82,996	\$64,388	\$58,077	\$52,503	\$41,597
Sundry Income	\$18,113	\$15,746	\$13,014	\$12,597	\$16,170	\$12,453
General Admission Fees	\$110,659	\$110,108	\$102,268	\$89,024	\$139,545	\$107,351
Voucher/ Season Passes	\$58,000	\$64,855	\$59,523	\$44,105	\$51,244	\$48,170
School and Vac Swim	\$61,124	\$41,632	\$45,021	\$45,364	\$52,641	\$29,403
Total Income	\$371,396	\$354,021	\$309,753	\$274,591	\$337,823	\$260,392
Employee Expenses						
Superannuation	\$24,862	\$20,965	\$27,182	\$20,595	\$20,333	\$16,533
Salaries & Wages	\$298,643	\$268,463	\$257,908	\$261,473	\$258,871	\$216,712
Employee Leave	\$18,309	\$12,476	\$22,786	-\$1,144	\$4,095	\$10,511
Workers Compensation	\$13,172	\$13,754	\$12,046	\$10,996	\$10,593	\$9,014
Income Protection	\$3,160	\$3,116	\$2,916	\$2,517	\$2,908	\$2,142
Sub Total	\$358,146	\$318,775	\$322,837	\$294,437	\$296,799	\$254,913

	2014	2013	2012	2011	2010	2009
Materials, Contracts & Other Expenses						
Energy	\$83,178	\$69,369	\$62,132	\$60,337	\$52,737	\$35,407
Water	\$36,838	\$27,732	\$18,567	\$54,363	\$63,384	\$40,471
Parts & Consumables	\$31,861	\$24,592	\$21,026	\$22,580	\$24,118	\$16,804
Other Expenses	\$55,169	\$57,745	\$25,926	\$26,890	\$38,179	\$26,581
Sub Total	\$207,046	\$179,438	\$127,651	\$164,170	\$178,418	\$119,263
Total Expenditure	\$565,192	\$498,213	\$450,488	\$458,607	\$475,217	\$374,176
Profit / Loss	(\$193,796)	(\$144,192)	(\$140,735)	(\$184,016)	(\$137,394)	(\$113,784)

3.3 Attendances

Table 3.4 summarises attendances at both Centres from 2004-2005 to 2013-2014. Key points to note are:

- Total attendances at Norwood have fluctuated around 40,000 over the last 10 years, with a low of 33,914 and a high of 45,902.
- Total attendances at Payneham have increased fluctuated significantly over the last 10 years, with a low of 61,721 and a high of 91,732. The high level of fluctuations is dramatically shown in the last five years, with three years of relatively high attendances, and two years of much lower attendances.

These fluctuations are likely to be due to the weather with higher attendances in warmer summers, closure of either pool due to repairs and closure of competing pools for repairs and/or refurbishment.

Table 3.4: Attendances from 2004-2005 to 2013-2014

	General Admission	School	Prepaid Season & Ticket Vouchers	Lessons	Other	Total
Norwood						
2004-2005	12,318	6,332	9,525	-	5,739	33,914
2005-2006	15,065	8,835	10,733	-	5,934	40,567
2006-2007	15,784	7,531	11,167	-	5,767	40,249
2007-2008	16,844	8,315	13,133	680	6,068	45,040
2008-2009	14,545	7,633	12,007	1,045	8,802	44,032
2009-2010	15,750	8,751	11,545	1,156	8,700	45,902
2010-2011	10,998	11,024	10,954	1,476	7,383	41,835
2011-2012	11,209	6,977	13,006	1,687	9,026	41,905
2012-2013	11,375	5,732	11,191	1,899	6,955	37,152
2013-2014	13,337	6,402	13,810	2,490	6,521	42,560
Payneham						
2004-2005	24,056	13,361	9,151	2,930	12,223	61,721
2005-2006	26,927	14,746	7,952	3,167	11,317	64,109
2006-2007	27,027	16,973	13,286	3,675	14,633	75,594
2007-2008	28,897	18,019	15,339	3,017	18,362	83,634
2008-2009	25,907	11,850	15,514	3,447	18,193	74,911
2009-2010	33,804	19,160	16,995	4,333	17,440	91,732
2010-2011	19,806	15,564	14,993	4,151	15,317	69,831
2011-2012	21,562	14,757	16,968	4,499	14,622	72,408

	General Admission	School	Prepaid Season & Ticket Vouchers	Lessons	Other	Total
2012-2013	22,040	21,824	17,042	4,636	18,159	83,701
2013-2014	20,904	24,461	16,069	5,297	21,458	88,189

3.4 Fee Structure

Table 3.5 summarises the main entry prices at the Norwood and Payneham pools and other outdoor pools in metropolitan Adelaide. It shows that Norwood and Payneham are at the upper end of the price spectrum for most entry categories.

Table 3.5: Entry Price Comparison

Pool	Adult	Child	Concession	Spectator	Family
Norwood	\$7.00	< 2 FREE 2 < 5 \$2.50 5-15 \$5.50	\$5.50	\$5.50	\$20.00
Payneham	\$7.00	< 2 FREE 2 < 5 \$2.50 5-15 \$5.50	\$5.50	\$5.50	\$20.00
Salisbury	\$5.00	\$4.00	\$4.50	\$2.00	\$15.00
Marion	\$6.50	< 4 FREE 4-14 \$5.30	\$5.30	\$2.70	\$18.50
Burnside	\$6.50	< 4 FREE > 4 \$5.50	\$5.50	\$4.80	\$19.00
Unley	\$6.80	< 2 FREE 2-5 \$2.80 6-15 \$5.20	\$5.20	\$4.00	\$21.00
Waterworld	\$7.00	< 2 FREE 2-15 \$5.50	\$5.50	\$3.50	\$22.00

3.5 Summary

Operating Subsidy

- In the 2013-2014 Swimming Season, the Swimming Centres had a combined operating deficit of \$440,189, an increase of \$177,858 or 68% over the previous six years. Income growth at Norwood has increased by 56%, compared with 43% at Payneham, and expenses have also increased at a greater rate at Norwood than Payneham.
- Norwood and Payneham had operating losses in 2013-2014 of \$246,393 and \$193,796, respectively.

Revenues

- Total revenue for the season was 11.1% up on the 2012-2013 Swimming Season, primarily due to income generated from swimming lessons at both Centres. Both Swimming Centres benefited from the early closure of the Burnside Swimming Centre.
- Norwood Swimming Centre attendances were 42,560, an increase of 5,408 on the 2012-2013 Season.
- Payneham Swimming Centre attendances were 88,189, an increase of 4,488 from the 2012-2013 Season. The increase was predominantly due to an increase in school attendances and swimming lessons.
- Revenue from swimming lessons was \$37,806 at Norwood Swimming Centre, an increase of 20% on 2012-2013.
- Revenue from swimming lessons at Payneham Swimming Centre was \$82,269.

Swimming lessons are at capacity for the Payneham Swimming Centre.

- Swim schools at Norwood and Payneham Swimming Centres experienced a significant increase in swimming lesson Income in 2013/14 to \$120,074 compared to \$82,219 in 2012-2013, an increase of 46%.

Expenditures

- Employee expenses have increased over the six years by 36% and 40% at Norwood and Payneham, respectively. However, materials, contracts and other expenses have increased by 174% and 74% at Norwood and Payneham, respectively.
- Massive increases in energy and water costs have occurred at both Centres (\$55,348 and \$125,080 at Norwood and Payneham, respectively).

Attendances

- Total attendances at Norwood have fluctuated around 40,000 over the last 10 years, with a low of 33,914 and a high of 45,902.
- Total attendances at Payneham have fluctuated significantly over the last 10 years, with a low of 61,721 and a high of 91,732. The high level of fluctuations is dramatically shown in the last five years, with three years of relatively high attendances, and two years of much lower attendances.



4 MARKET INTELLIGENCE

This chapter provides an overview of the aquatics industry both locally and nationally.

4.1 Trends

General trends which need to be considered in the future direction and development of the Council's Swimming Centres are:

- 1 **A gradual aging of the population.** As life expectancy increases, birth rates stay low and the “baby boomers” of the 1950s and 1960s grow older, there is a new demand for programmed hotter water areas as well as pools suitable for therapy and older adult exercises. It also means it is essential to have a range of pools with different water depths and temperatures.
- 2 **Flexibility in the times when people recreate.** As demands on people's time increases and work practices change people are seeking to take their recreation at different times, over a broad spread of hours and at facilities that offer a lot of activities under the one roof. Indoor pools and health and fitness facilities are particularly attractive and getting easier to use as many are open 12 to 16 hours, 7 days a week
- 3 **Increased variety in recreation and leisure options.** People's leisure and recreation options are changing towards newer more varied activities offered over a greater range of timeframes compared to previous decades where limited variety in activities and scheduling occurred. This has supported the trend to more multi-use facilities to attract a broader range of users as well as multiple water areas to meet different needs at the one centre.
- 4 **Constraints to recreation and leisure participation.** Lack of time, lack of facilities close by, family and work constraints, health problems and cost of service or use of facilities are the main constraints to many people's recreation and leisure participation. The development of targeted markets of users, programs and services at aquatic and health and fitness centres has assisted in reducing some of these participation constraints. Industry standards indicate most people in metropolitan areas, use aquatic centres that are close to home, and will travel between 10 and 20 minutes. This usually sees a catchment zone of up to 5km radius of a centre. The exception is in those circumstances where centres are “destinations” and attract users from across a metropolitan area or where there is a lack of quality facilities close by.
- 5 **Changing employment structures, trading and work hours.** These trends often makes participation in traditional sports difficult and therefore people are looking for facilities that are open longer hours and have a lot of activity options at the one site.
- 6 **Different people want different activities.** The broadening different cultural, age, gender of the population sees the need for facilities to offer potential users a much more varied range of programs and services than previously offered.
- 7 **Provision of high standards and quality of facilities and services.** People are more and more looking for high standard, high quality facilities and services to meet their recreation and leisure needs. This has also seen the trend for indoor facilities becoming very popular as they allow activity in safe and secure spaces in all weather and environmental conditions. This leads to indicating that building low standard, low cost facilities will not attract the maximum user market

- 8 **Desire for activities to be affordable.** The development of multi-purpose aquatic leisure centres has enabled the high operating cost activity of aquatics to be cross-subsidised by more profitable activity areas such as health and fitness, food and beverage and entertainment areas. This has enabled many facilities to keep general entry fees low to encourage use whilst seeking users who want special services to contribute at a greater level to the cost of such activities.
- 9 **Universal Access.** It is now commonly expected that people with special needs are catered for in public aquatic and leisure facilities. Changes in Government legislation in regard to Disability Access now require modern facilities to have ramp access into pools, hoists and accessible toilets and change facilities. There is also the growing demand for programs and activities to be offered to people of all different abilities, physical condition and skill levels.

4.2 Major Markets

The aquatics market comprises at least six distinct segments, each requiring a specific marketing mix to maximise market share:

- 1 Lap swimming – tend to swim early in the morning or after work, supplemented by some who swim during their lunch time. Require lane space (at least 25 metre pool size), with speed indicators for each lane (i.e. slow, medium, fast). Tend to swim on a regular basis, and often more than once per week. Water temperature is preferably between 26°C and 28°C. Most lap swimmers prefer to swim year round.
- 2 Swim coaching/squads – usually children and young people up to about 16 years, supplemented by adult squads mainly masters swim squads and triathlon swim squads. Main squad training times are early morning (from 5.30am) and early evening (5.30pm – 7.30pm). Require reserved lane space, for between three and 10 times per week. Water temperature is preferably between 26°C and 28°C. As with lap swimmers, squads swim year round.
- 3 Learn to swim lessons (private, group and school) – lessons are offered to all ages, from “mothers and babies” to adult lessons. Most lessons are conducted after school (4pm to 6pm) and on Saturday and Sunday mornings. Adult lessons tend to be offered later in the evening and “mothers and babies” classes are usually on weekday morning between 9am and noon. Most classes are offered once a week, often for a ten week term or block. Water temperature is preferably between 29°C and 31°C. The number of people in swim lessons declines in winter, although many children participate in lessons year round.
- 4 Recreational aquatic play – all humans play and socially interact. In an aquatic environment, play is often defined by the age of participants (i.e. pre-schoolers, junior primary school age, senior primary school age, young teenagers, young people and adults). Play equipment is larger and more adventurous the older the participant.

Play experiences are enhanced by either moving water (e.g. water cannons and rapid rivers) or moving the participant (e.g. water slides and climbing structures). Most recreational play is conducted after school/work time (e.g. weekday evenings and weekends). It can also involve relaxation (e.g. sunbathing, and “hanging about”) and supervising young children. Water temperature is preferably between 28°C and 31°C.
- 5 Aquatic fitness programs – in addition to lap swimming, aquatic fitness programs include aqua aerobics (group exercise to music in water), water walking (using a floatation vest), and other similar gentle exercise activities. These activities tend to attract older adults, particularly women. Classes are held at times to suit the participants (e.g. older women on weekday mornings). Water temperature is preferably between 28°C and 31°C.

- 6 Therapeutic and rehabilitation programs – tend to be supervised by a physiotherapist. In some instances an individual will perform prescribed exercises for warm water exercise without supervision. The main requirement is warm water (approximately 34°C) of about 1.5m in depth.

4.3 Competition

Table 4.1 summarises swimming centres which directly compete for customers with either Payneham or Norwood Swimming Centres. Figure 4.1 indicates the location of each competitor. Key points to note are:

- Twenty-three (23) pools are located in the catchment area of the Payneham and Norwood Swimming Centres.
- Five (5) public aquatic centres are located in Burnside, Unley, Tea Tree Gully, Regency Park and Adelaide. All are heated pools. Whilst Adelaide Aquatic Centre and The Parks are an indoor facilities, the other three (3) pools are outdoor.
- In addition, Campbelltown City Council has recently commenced construction of an indoor swimming centre in the redeveloped Campbelltown Leisure Centre. It will comprise an indoor 25m pool, teaching pool and splash pad. It is located 2.4km from Payneham Swimming centre on Lower North East Road.
- Ten (10) commercial indoor swimming centres compete for customers, particularly for the swim school. Six swimming centres are known to have strong learn-to-swim programs. Four (4) of the ten (10) facilities are primarily fitness centres, with a swimming pool.
- Six (6) private schools have swimming pools, with three being indoor. Swim schools operate from the Prince Alfred College pool, and therefore directly competes for customers with Norwood Swimming Centre.
- Nine hydrotherapy pools are located in the catchment area. However, none are located to the east of either the Payneham or Norwood Swimming Centres.

A review of existing and proposed competition indicates the aquatics market is very competitive, particularly for major markets – aquatic education and aquatic fitness. The only major market which appears to be under serviced is the play and recreational market. Tea Tree Gully Waterworld, Adelaide Aquatic Centre and Burnside Swimming Centre have play elements, and Campbelltown Leisure Centre is planned to include a splash pad.

4.4 Summary

Key trends which may impact on the future of the two swimming centres are:

- A gradual aging of the population.
- Flexibility in the times when people recreate.
- Increasing range in recreation and leisure options.
- Time constraints to recreation and leisure participation.
- Changing employment structures, trading and work hours.
- Great market segment differentiation.
- Demand for high standard and quality of facilities and services.
- Desire for activities to be affordable.
- Expectation for universal access.

The aquatics market comprises at least six distinct segments, each requiring a specific marketing mix to maximise market share:

- Lap swimming
- Swim coaching/squads

- Learn to swim lessons (private, group and school)
- Recreational aquatic play
- Aquatic fitness programs
- Therapeutic and rehabilitation programs

Payneham and Norwood Swimming Centres compete in a market against twenty three pools including:

- Five public, heated aquatic centres – two are indoor facilities and three are outdoor.
- In addition, Campbelltown City Council has recently commenced construction of an indoor swimming centre in the redeveloped Campbelltown Leisure Centre.
- Ten commercial indoor swimming centres.
- Six private schools have swimming pools, with three being indoor.
- Nine hydrotherapy pools.

The aquatics market is very competitive, particularly for major markets – aquatic education and aquatic fitness. The only major market which appears to be under serviced is the play and recreational market. Tea Tree Gully Waterworld and Adelaide Aquatic Centre have play elements, and Campbelltown Leisure Centre is planned to include a splash pad.

Table 4.1: Inventory of Competing Swimming Centres

Name	Number and type of pools	Heated/ unheated	Indoor/ outdoor	Other Facilities
Government Facilities				
Norwood Swimming Centre	Main Pool - 50m, diving board	Heated	Outdoor	BBQs
	Toddler pool max 0.8m	Heated	Outdoor	
Payneham Swimming Centre	Main Pool -- 50m, 8 lanes	Heated	Outdoor	BBQs
	Learners pool	Heated	Outdoor	
	Toddler Pool	Heated	Outdoor	
Burnside Swim Centre	Main Pool - 50m, 8 lanes, 1.1m - 1.8m depth	Heated	Outdoor	Spa & Steam room
	Learners Pool - 0.6m - 0.9m depth	Heated	Outdoor	Playground
	Toddler Pool - 0.0m - 0.6m depth	Heated	Outdoor	BBQ
Adelaide Aquatic Centre	Main Pool - 50m	Heated	Indoor	Health & Fitness Suite
	Diving pool - 3m platform. 1m & 3m Spring Boards	Heated	Indoor	Crèche
	Leisure Pool	Heated	Indoor	
Unley Outdoor Pool	Main Pool - 50m, 8 lane, 1.2m- 2m depth	Heated	Outdoor	
	Junior Pool - 0.7m - 0.85m depth	Heated	Outdoor	
	Toddler pool - 0.6m - 0.75m depth	Heated	Outdoor	
Tea Tree Gully WaterWorld	Main Pool - 50m, 8 lanes, 1m - 1.8 depth	Heated	Outdoor	Aqua-Run
	Learners Pool - 20m x 18m, 0.75m - 1.1m depth	Heated	Outdoor	BBQ's
	Toddler Pool - 15m long, 15cm deep	Unheated	Outdoor	Function Rooms
	Interactive Splash Pad	Unheated	Outdoor	
	Waterslides	Unheated	Outdoor	
The Parks Recreation and Sports Centre	25m Lap pool – 6 lanes	Heated	Indoor	Crèche Health & Fitness Suite Stadium Sports

Name	Number and type of pools	Heated/ unheated	Indoor/ outdoor	Other Facilities
Commercial Facilities				
Next Generation	25m lap pool, 3 lanes, 1.2m deep 25m lap pool, 3 lanes, 1.2m deep	Heated Heated	Indoor Outdoor	Tennis & Squash Health & Fitness Suite Crèche Function rooms
Fitness on Flinders	25m lap pool, 4 lanes, 1.2m - 1.8m depth	Heated	Indoor	Health & Fitness Suite
Stateswim Unley	20m lap pool, 0.8m - 1.2m depth	Heated	Indoor	
Thebarton Aquatic Centre	Main Pool - 25 meters, 7 lanes, 0.9m - 3m depth Hydrotherapy Pool - 10 meters, 2 lanes, 1.3m deep Learners Pool - 10 meters, 3 lanes, 0.85m deep	Heated Heated Heated	Indoor Indoor Indoor	
Norwood Swimming School	25m lap pool - 6 lanes,	Heated	Indoor	Play café
Goodlife Health Club Payneham	15m pool, 1m - 1.5m depth	Heated	Indoor	Health & Fitness
Fit Life Health & Fitness	Main Pool - 15m, 4 lanes, 0.9m - 1.8m depth	Heated	Indoor	Spa & Sauna Weights / Free Weights Group Fitness
Funlife Fitness Centre	Hydrotherapy Pool – 2 lanes	Heated	Indoor	Spa & Sauna Weights / Free Weights Group Fitness Swimming Lessons Crèche
Paragon Swim Centre	18m Lap pool - 5 lanes	Heated	Indoor	
Swim Safe Swim School	20m lap pool – 4 lanes	Heated	Indoor	

Name	Number and type of pools	Heated/ unheated	Indoor/ outdoor	Other Facilities
School & University Facilities				
UniSA – Magill Campus Prince Alfred College (Kent Town Swim)	25m lap pool – 8 lanes 25m pool, 7 lanes Beginner Pool, 3 lanes	Heated Heated Heated	Indoor Indoor Indoor	2 x Basketball Courts Health and Fitness Function rooms
St Peters Girls School	1 x 25m Pool	Heated	Outdoor	
St Peters Boys School	2 x Pool	Heated	Indoor	
Seymour College	1 x 25m Pool	Heated	Indoor	
Loreto College	1 25m Pool	Heated	Outdoor	
Pembroke School	1 25m Pool	Heated	Outdoor	



Figure 4.1: Mapping Competitor Swimming Centres

Pools

- 1 Fitness On Flinders
- 2 Burnside Swimming Centre
- 3 Norwood Swim School
- 4 Unley Swimming Centre
- 5 Unley Swimming Academy
- 6 Seymour College
- 7 Thebarton Aquatic Centre
- 8 Adelaide Aquatic Centre
- 9 Waterworld Aquatic Centre
- 10 St Peters Girls School
- 11 St Peter's College
- 12 Kent Town Swim
- 13 UniSA - Magill Campus Pool
- 14 Next Generation Clubs
- 15 The Parks Recreation and Sports Centre
- 16 Paragon Swim Centre
- 17 State Swim Modbury
- 18 Swim Safe Swim School
- 19 Goodlife Health Club Payneham
- 20 Loreto College Marryatville
- 21 Pembroke School
- 22 Fit Life Health and Fitness
- 23 Funlife Fitness Centre

Hydrotherapy Pools

- 24 The Physio Clinic
- 25 RP Health Physio Adelaide
- 26 Eastwood Physio
- 27 Child's Play Physio - Torrens Park
- 28 Child's Play Physio - Klemzig
- 29 Child's Play Physio - Nth Adelaide
- 30 Calvary Rehabilitation Hospital
- 31 Royal Society for the Blind of S.A
- 32 Women's & Children's Hospital



5 MARKET RESEARCH

This chapter summarises data collected during a series of market research activities including a household survey, user survey and post code survey.

5.1 Population

The age profile of the City of Norwood, Payneham & St Peters at the 2006 and 2011 Census is summarised in Table 5.1. Key points of relevance to use and development of aquatic centres are:

- Total population between 2006 and 2011 increased marginally from 33,731 to 34,884.
- The main population increases have been in the 25 to 39 and 55 to 69 age groups.
- The main learn to swim market (5 to 14 years) had a small increase, and represents 9% of the population, which is a lower proportion than for "greater Adelaide" 12.4%).
- Norwood, Payneham & St Peters has an older age profile than "greater Adelaide", particularly in the 55+ age group.

Table 5.1: Age Profile at 2006 and 2011 Census and Projected for 2026

Age Group	2006		2011		2026	
	Number	Percentage	Number	Percentage	Number	Percentage
0 to 4	1,568	4.6%	1,696	4.9%	1,864	5.0%
5 to 14	3,045	9.0%	3,143	9.0%	3,541	9.4%
15 to 24	5,023	14.9%	4,900	14.1%	5,588	14.9%
25 to 39	7,571	22.4%	8,082	23.1%	7,638	20.3%
40 to 54	6,776	20.0%	6,888	19.7%	6,173	16.4%
55 to 69	4,773	14.1%	5,315	15.2%	6,251	16.7%
70 and over	4,975	14.8%	4,860	14.0%	6,484	17.3%
Total	33,731	100.00%	34,884	100.0%	37,539	100.0%

According to Council's website, the population of the City of Norwood Payneham & St Peters at the 30th June 2014 was estimated to be 37,074. The Department of Planning and Infrastructure has projected population and age profile for all local governments in SA (refer to Table 5.1). The population is projected to stabilise at slightly more than 37,000 residents. Whilst the number of children aged 5 – 14 will increase by about 400, the number of older adults aged over 55 years will increase by over 2,500. This suggests that aquatic centres will increasingly be expected to service the needs of this age group.

5.2 Household Survey

A telephone survey was conducted of 300 households in the City of Norwood, Payneham & St Peters. A random sample of households was selected and interviews conducted with people aged 15 years and over. The sample was further selected within each household to ensure broad representation of the Council area, by both gender and across all age groups.

The final sample comprises people with the following characteristics:

Characteristic	%
Gender	
Male	47%
Female	53%
Age	
15 – 29 years	20%
30-49 years	29%
50-69 years	31%
70+ years	19%
Postcode	
5067	15%
5068	20%
5069	26%
5070	38%

5.2.1 Swimming Centres Visited

Respondents were asked which swimming and aquatic centres they had visited most often in the last 12 months? It was found that 47% had not visited a swimming centre. Of the 53% who had visited a Swimming Centre:

- Norwood Swimming Centre was the most popular. It was also the most popular with females and respondents aged 15 – 29, 50 – 69 and 70+ years.
- Payneham Swimming Centre was the second most popular pool, and the most popular with males and respondents aged 30 – 49 years.

	Total %	Male %	Female %	15-29	30-49	50-69	70+
Norwood Swimming Pool	34%	24%	42%	40%	32%	31%	42%
Payneham Swimming Pool	26%	28%	27%	24%	36%	19%	29%
Adelaide Aquatic Centre	13%	17%	12%	13%	16%	17%	0%
Burnside Swim Centre	4%	6%	4%	5%	3%	2%	8%
Norwood Swimming School	4%	0%	6%	3%	4%	2%	0%
Next Generation	4%	4%	2%	0%	1%	4%	13%
Other pools	16%	21%	7%	15%	8%	25%	8%

Further analysis found:

- 65% of respondents who had visited Norwood Swimming Centre lived in postcodes 5067 (Norwood South, Rose Park, Kent Town, Norwood, Beulah Park) and 5068 (St Morris, Trinity Gardens, Leabrook, Marryatville, Kensington Gardens, Kensington Park, Heathpool, Kensington),
- 91% of respondents who had visited Payneham Swimming Centre lived in postcodes 5069 (Hackney, Maylands, College Park, Evandale, Stepney, St Peters) and 5070 (Royston Park, Payneham South, Payneham, Marden, Firle, Felixstow, Joslin, Glynde).

Other swimming pools visited were:

	Total %	Male %	Female %	15-29	30-49	50-69	70+
Payneham Swimming Pool	16%	14%	17%	8%	23%	16%	7%
Norwood Swimming Pool	10%	7%	13%	11%	11%	9%	7%
Adelaide Aquatic Centre	14%	20%	9%	11%	20%	11%	7%
Burnside Swim Centre	8%	8%	7%	3%	11%	9%	0%
Other pools in Adelaide	12%	11%	13%	11%	16%	7%	14%
Not visited any other pool	53%	50%	55%	66%	39%	52%	71%

Reasons why respondents chose the swimming and aquatic centre visited most often were primarily because it was close to home and/or had good facilities. A high proportion of respondents aged 70+ years also nominated friends/family use it and to attend health and fitness class/program. A high proportion of respondents aged 15 - 29years also nominated close to work/school.

	Total %	Male %	Female %	15-29	30-49	50-69	70+
Close to home	65%	68%	61%	66%	72%	59%	50%
Good facilities	22%	21%	22%	21%	23%	18%	29%
It has an indoor pool	9%	13%	6%	5%	13%	9%	7%
Nice/clean environment	8%	7%	10%	8%	10%	9%	0%
Close to work/school	8%	7%	9%	16%	7%	5%	0%
Take child to swim lessons	6%	4%	9%	0%	10%	9%	0%
Low entry charges	6%	7%	6%	5%	5%	9%	7%
Less crowded	6%	4%	7%	8%	8%	2%	0%
Friends/Family use it	6%	4%	7%	5%	2%	7%	21%
To attend health and fitness class/program	6%	8%	4%	0%	3%	9%	14%
Suitable open hours/open all year	4%	3%	6%	0%	7%	7%	0%
It has an outdoor pool	4%	1%	7%	8%	3%	5%	0%
Chosen by school/part of school program	3%	0%	5%	5%	2%	2%	0%
Shaded areas	3%	3%	2%	3%	2%	5%	0%
Range of pools available	3%	0%	5%	0%	3%	2%	7%
Leisure water/fun pools	1%	1%	1%	0%	2%	2%	0%
Quality of swim coaching	1%	0%	2%	0%	2%	2%	0%
Quality of swim teaching	1%	0%	2%	0%	3%	0%	0%
Availability of lap swimming space	1%	3%	0%	3%	0%	2%	0%
Other	13%	16%	10%	18%	11%	9%	14%

Further analysis found the most popular reasons for visiting Norwood and Payneham Swimming Centres were:

- Norwood Swimming Centre – close to home (76%), good facilities (20%) and nice/clean environment (15%)
- Payneham Swimming Centre - close to home (93%) and good facilities (12%)

The results clearly indicate that both Norwood and Payneham swimming centres have a highly localised catchment. Adelaide Aquatic Centre is also well used by respondents, and to a lesser degree so is Burnside Swim Centre.

5.2.2 Activities Undertaken

Respondents were asked what is the main activity usually undertaken at the swimming and aquatic centre visited most often.

- Overall, the most popular activities are lap/fitness swimming, recreational swimming, taking children to swim lessons and recreational swimming with children.
- Lap swimming was the most popular activity for both genders and respondents aged 50+ years.
- Recreational swimming was the most popular activity for respondents aged 15 – 29 years.
- Taking children lessons was the most popular activity for respondents aged 30 - 49 years.

	Total %	Male %	Female %	15-29	30-49	50-69	70+
Lap/fitness swimming	33%	39%	27%	37%	20%	48%	36%
Recreational swimming	22%	28%	17%	45%	13%	14%	29%
Taking children to swim lessons	16%	9%	23%	0%	34%	9%	0%
Recreational swimming with children	13%	12%	15%	0%	20%	16%	14%
Spectator	3%	1%	4%	0%	5%	2%	0%
Swim coach/teacher	3%	0%	5%	3%	3%	2%	0%
School Swimming Carnival	3%	0%	5%	11%	0%	0%	0%
Aqua aerobics	2%	1%	2%	0%	0%	2%	14%
Hydrotherapy/Rehabilitation	1%	1%	1%	0%	0%	2%	7%
Competition swimming	1%	3%	0%	5%	0%	0%	0%
Gym/Group Fitness	1%	3%	0%	0%	0%	5%	0%
Spa	1%	3%	0%	0%	3%	0%	0%
Other	1%	0%	1%	0%	2%	0%	0%

Further analysis found the most popular activities were:

- Norwood Swimming Centre - lap/fitness swimming (39%), recreational swimming (26%) and taking children to swim lessons (17%)
- Payneham Swimming Centre - recreational swimming (30%), lap/fitness swimming (26%) and recreational swimming with children (21%)

5.2.3 Frequency of Visitation

Respondents were asked how often they had visited swimming centres in the last 12 months? It was found 41% visit swimming pools all year round and 47% in summer only (9% visited only once). A significant proportion of respondents visit pools at least weekly – 25% all year round and 14% in summer.

	Total %	Male %	Female %
All year round - On average at least once per week	25%	21%	29%
All year round - On average at least once per fortnight	3%	5%	0%
All year round - On average at least once per month	5%	4%	6%
All year round - Less than once per month	11%	13%	10%
Summer only - On average at least once per week	14%	12%	16%
Summer only - On average at least once per fortnight	6%	8%	4%
Summer only - On average at least once per month	10%	11%	10%

	Total %	Male %	Female %
Summer only - Less than once per month	17%	20%	15%
Once only	9%	7%	11%

5.2.4 Important Features

Respondents were asked how important were a series of features when deciding which swimming and aquatic centre to use. Importance was rated on a scale of 1 to 5 where 1 = very unimportant and 5 = very important.

The most important features were water quality, location and shade around, and over, pools.

	Total Mean
Water quality of swimming pools	4.68
Location (close to home, work, school)	4.33
Shade areas around the pools	4.15
Shade over pools	3.89
50m pool	3.69
Entry price to swimming centre	3.62
Lane space for lap swimming	3.57
Open all year	3.53
Car parking	3.49
Children's aquatic play areas	3.20
Quality of swimming teachers and instruction	3.18
Quality and reputation of swim coaching	3.03
Health and fitness facilities	2.53
Hydrotherapy/exercise pool	2.19
Quality of food and beverage services (i.e. kiosk)	2.16
Sauna/spa	2.05
Availability of public transport to the centre	1.77

5.2.5 Reasons for Non Use

Respondents were asked to give reasons why they had not used or visited a public swimming pool in the past 12 months.

The main reasons related to personal preferences (not interested, don't like swimming), access to other facilities (own or neighbours pool, or use beach) or age and health reasons. It must be noted that these reasons are very difficult to combat, in other words to convert a non-user to a user of public swimming pools.

	Total %
Not interested	27%
Have and use own pool	19%
Too old	18%
Go to the beach	15%
Too busy	9%
Health problems	8%
Don't like swimming	6%
Use neighbours/friends pool	6%

5.2.6 Adequacy of Existing Pools

Respondents were asked whether swimming and aquatic facilities in Norwood, Payneham & St Peters Council area were adequate to meet their personal and family needs.

73% answered yes, 13% no and 14% don't know (86% of respondents who had an opinion answered yes).

Respondents were asked how can the Norwood and Payneham Swimming Centres be improved. The results were very similar; with 60% either not knowing or believing improvements were not necessary. The most common improvement was additional shade.

	Norwood	Payneham
Don't know	52%	52%
No improvement needed	8%	8%
More shade	9%	9%
Longer swim season	5%	5%
Improve change room space/facilities	5%	5%
More Parking	4%	5%
Indoor/year round pools	4%	0%

A follow up question asked if the improvements were made, what effect would it have on respondents' use of either swimming centre. Again the responses were very similar. Improvements are likely to increase use, but not to a large extent. 16% of respondents would start to use the pools, and 17% would expect an increase in use of 50+%.

	Norwood	Payneham
Do not currently use and would continue not to use	9%	9%
Do not currently use and would start to use	16%	16%
No change to existing use	20%	20%
Small increase in use (less than 10%)	11%	11%
Moderate increase in use (10% to 50%)	26%	26%
Large increase in use (50% to 100%)	13%	13%
Very large increase in use (over 100%)	4%	4%

5.3 Users Survey

A survey was conducted of users of both Norwood and Payneham Swimming Centres. A questionnaire was handed to customers using both pools and requested to complete it and return it to reception staff. In addition customers were given the opportunity to complete the questionnaire on line via the SGL website. A range of stakeholders identified by Council were also advised of the on line questionnaire and invited to circulate too their members and constituents. The final sample comprised 245 people with the following characteristics:

Characteristic	%
Gender	
Male	38%
Female	62%
Age	
Under 20 years	2%
21-30 years	3%
31-45 years	24%
46 – 60 years	36%

Characteristic	%
60+ years	34%
Postcode	
5067	9%
5068	19%
5069	9%
5070	15%
Other postcodes	<5%

It is not clear whether the sample represents the mix of users at the Norwood and Payneham Swimming Centres. The sample was biased towards females and people aged over 45 years. It also reflects the localised catchment of both pools with 52% of respondents living in the postcode areas which are primarily within the City of Norwood, Payneham & St Peters.

5.3.1 Swimming Pools Visited

Respondents were asked which swimming centre they most recently visited. 53% and 47% nominated Payneham and Norwood Swimming Centre, respectively. When asked which swimming pool they had used most often the results showed that Norwood and Payneham were the most popular followed by Adelaide Aquatic Centre.

	Proportion of Respondents
Norwood Swimming Centre	37%
Payneham Swimming Centre	36%
Adelaide Aquatic Centre	10%
Other pools	<4%

Further analysis found:

- 4% of Norwood users had visited Payneham Swimming Centre, and 9% of Payneham customers had visited Norwood Swimming Centre.
- 14% of Payneham customers had visited Adelaide Aquatic Centre, compared with 5% of Norwood customers.

Respondents were asked how often they visited a swimming centre in the previous 12 months. Responses indicate about half the respondents visit only in summer, whereas the other half use pools on a year round basis. A substantial proportion of pools users are regular, i.e. at least once per week.

Activity	Proportion of Respondents
All year round - On average at least once per week	46%
All year round - On average at least once per fortnight	5%
All year round - On average at least once per month	1%
All year round - Less than once per month	1%
Summer only - On average at least once per week	38%
Summer only - On average at least once per fortnight	5%
Summer only - On average at least once per month	4%
Summer only - Less than once per month	1%
Once only	0%

5.3.2 Activities Undertaken

Respondents were asked to nominate the main, and other, activities they participated during their most recent visit. Lap/fitness swimming was by far the most popular activity with respondents. Recreational swimming was the next most popular activities.

Respondents at both pools had similar activity profiles, although Payneham customers appear to have greater emphasis on lap/competition swimming. Norwood customers seem to spend more time recreational swimming by themselves or with children.

Activity	Total		Norwood		Payneham	
	Main	Other	Main	Other	Main	Other
Lap/fitness swimming	67%	36%	61%	36%	72%	39%
Recreational swimming	8%	18%	13%	18%	4%	13%
Recreational swimming with children	4%	12%	6%	3%	3%	10%
Swim squad swimming	6%	7%	9%	6%	4%	8%
Taking child to swim lessons	6%	4%	7%	2%	5%	3%
Swim coach/teacher	5%	5%	3%	2%	6%	7%
Competition swimming	2%	1%	0%	0%	3%	2%
Aqua aerobics	1%	2%	0%	2%	1%	2%
Spectator	1%	6%	0%	7%	1%	5%

5.3.3 Improvements

Respondents were asked to rate the importance of a suite of aquatic components to improve the swimming centres. Ratings were based on a score out of 10 where 1=Very unimportant, and 10=Very important. The results clearly indicate the importance of an outdoor 50m lap/competition pool. All other aquatic components received a much lower importance rating.

Customers at Payneham appear to consider lap/competition pools are more important than Norwood customers. A leisure/fun pool and diving pool were the only two components which Norwood customers considered more important than Payneham customers.

Improvement	Average Score		
	Total	Norwood	Payneham
50m Lap/competition pool (outdoor)	9.0	8.5	9.4
Leisure/fun pool	6.5	6.8	6.2
Teaching pool	6.4	6.4	6.4
50m Lap/competition pool (indoor)	6.4	5.2	7.5
25m Lap/competition pool (indoor)	5.2	4.1	6.1
25m Lap/competition pool (outdoor)	5.2	4.9	5.5
Water play area (waterslide, sprays)	4.5	4.2	4.7
Hydrotherapy pool	4.3	4.2	4.4
Spa pool	3.4	2.8	4.0
Diving pool	3.4	3.8	3.1

If the improvements are undertaken, the likely impact on use was ascertained. The results indicate a significant in use will occur if the improvements requested by respondents are undertaken.

Level of Increased Use	Proportion of Respondents
Same use	18%
Small increase in use (less than 10%)	6%
Moderate increase in use (10% to 50%)	27%
Large increase in use (50% to 100%)	29%
At least double my use (over 100%)	18%

5.3.4 Reasons for Not Increasing Use

Respondents were asked what prevented them from using swimming centres more often. The predominant reason was that respondents were already heavy users of swimming pools, followed by family or work commitments (and too busy). All these reasons relate to the personal circumstances of the respondent and hence are very difficult to counteract.

Level of Increased Use	Proportion of Respondents
Already heavy user of swimming centres	28%
Work commitments	17%
Family commitments	12%
Lack of information	10%
Too busy	7%
Opening times don't suit	6%
Cannot afford it	4%
Activity not available	2%
Not value for money	2%
Health problems	2%
No suitable facilities	1%
Transport problems	1%
Not interested/Not sure/Don't know	1%

5.3.5 General Comments

Respondents were offered the opportunity to make any comment about swimming pools in the Council area. Most respondents took the opportunity to comment, consequently, the number and diversity of responses was extensive. Analysis of the comments has been conducted using a "Wordle" technique, whereby the more often a word appears the larger the word appears.

The Wordle graphic highlights key emotive words – great, community, friendly, staff, family, love, good, excellent. The responses are overwhelmingly positive.

postcode survey. Norwood has a higher proportion of residents from within the City of Norwood Payneham & St Peters. Payneham attracts more customers from adjacent Council areas, particularly the City of Campbelltown and the City of Port Adelaide Enfield.

Figure 5.1: Norwood Swimming Centre Postcode Results

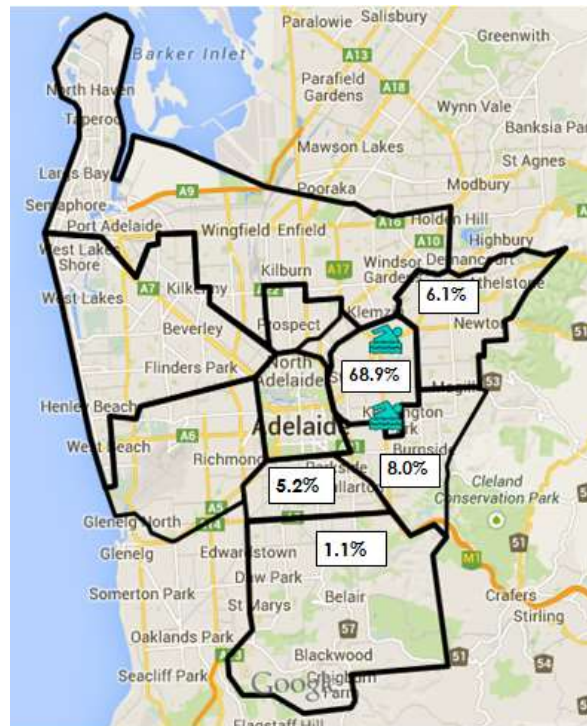
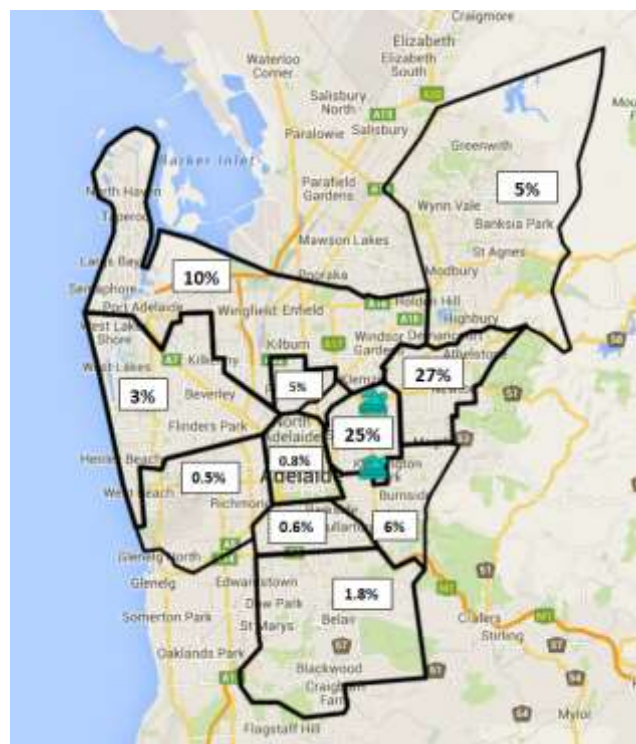


Figure 5.2: Payneham Swimming Centre Postcode Results



5.5 Stakeholder Feedback

Comments received from people and groups interested in the future use and development of the Norwood and Payneham Swimming Centres are summarised below.

5.5.1 Email Feedback

A comprehensive list of people and organisations which may be interested in the future use and development of the Norwood and Payneham Swimming Centres were contacted by email and invited to provide comments. The list comprised:

Friends of the Norwood Pool	Norwood Swimming Club
Payneham Swimming Club	Rotary Club of Norwood
Disabled in Norwood, Payneham & St Peters	Kensington Senior Citizens Club
Council's Youth Advisory Council	Payneham Youth Centre/Club
College Park Scouts	Norwood Tennis Club
Kensington Residents Association	Norwood Residents Association
Preserve Kent Town Association	St Peters Residents Association
Rotary Club of St Peters	Lions Club of Norwood
Life Be In it	Triathlon SA
Active Ageing SA	Girl Guides
Australian Council for Health, PE & Recreation	St Matthew's Homes
Women's Community Centre	

Responses were received from the Kensington Residents Association, the Payneham Swimming Club and Friends of the Norwood Pool (two responses were received). Major points raised in the written submissions were:

- "Local government does not have a vision that includes providing health and recreation facilities ...that promote a healthy and active lifestyle".
- the Council has conducted regular surveys of customers, but nothing changes. Perception that Council wants to close the Norwood pool.
- Entry prices to the Norwood pool are the "highest for any local Council maintained pool in the country".
- Norwood pool is locally referred to as the Kensington and Norwood Pool. Its "beautiful surrounds and grassed areas in an urban setting is unique".
 - ✓ Provide facilities to improve and diversify users experience to increase patronage, such as sheltered seating, BBQs and improved shop/catering.
 - ✓ Marketing the pools assets is the most cost effective solution to ensuring the pool's long term viability. Ensure the pricing structure is the same as other pools.
- Constructing an indoor pool would greatly improve the level of service provided by Council. Option to extend the outdoor season (similar to Unley pool) or open all year.
- An "affordable fee structure for Payneham Swimming Club for use of the Payneham pool is critical to ensuring the survival of the club.

5.5.2 Key Informant Interviews

Personal or telephone interviews were conducted with Council officers (Sharon Perkins – Acting General Manager, Corporate Services and Jake Boerema Acting Manager Swimming Centres), Department of Education and Child Development Aquatic Education Coordinators (Sharon Arend – Payneham and Jackie Copson – Norwood), Royal Life Saving Society (Denise Powers) and Norwood Swimming Club (Scott Ireland- President). Major points raised were:

- Users of both Norwood and Payneham Swimming Centres are very passionate about their respective Centres.
- The Council does not have an agenda to close either swimming centre. Want to continue providing aquatic facilities with cost effective upgrades, and ideally reduce operating deficits and maximising revenues.
- The Kiosk's at both Centres are contracted. The Payneham Swimming Centre has a low lease fee, whereas no lease fee is charged at Norwood Swimming Centre. Learn-to-Swim lessons are managed in-house at both pools.
- Swim clubs conduct swim coaching. Clubs pay \$10 per lane per hour for coaching, plus swimmers pay on entry (Payneham and Norwood Swimming Club members pay \$3 and \$4 per entry, respectively). Norwood club members pay on entry to the pools, whereas Payneham club members enter via the club rooms and the club is invoiced for their entry.
- Aim to retain two lanes for recreational swimming and two lanes for lap swimming. The water temperature is maintained at 27°C.
- Main deficiencies at the Norwood Swimming Centre are:
 - ✓ Lack of shallow water for 5 – 10 year old children (about 900mm – 1000mm)
 - ✓ Water temperature could be higher
 - ✓ Toddlers pool too small
 - ✓ Tiling in toddlers pool in poor condition, causes cut feet
 - ✓ Change rooms too small and no provision for people with disabilities
 - ✓ No wheelchair access to change rooms
 - ✓ Lack of office space and area for instructors' personal items
 - ✓ Concrete starting blocks are slippery and not safe.
- Main deficiencies at the Payneham Swimming Centre are:
 - ✓ Need deeper water for some lifesaving activities
 - ✓ Water temperature could be higher
 - ✓ Toddlers pool too small
 - ✓ Separate change rooms for school children and general public
 - ✓ Need separate change rooms for school swim instructors as not allowed to shower at same time as children in lessons
 - ✓ Provide an office for school swimming instructors and larger storage area
 - ✓ More shade and seating around pools
- Norwood Swimming Club wants more regular lanes at the Payneham Swimming Centre and shared use of the club rooms with the Payneham Swimming Club. The Norwood Swimming Centre is not ideal due to complaints from the general public about club squads and the depth of water in the diving area reduces the water temperature.

5.6 Summary

The population of the City of Norwood Payneham & St Peters in 2014 was estimated to be 37,074. It is projected to stabilise at slightly more than 37,000 residents through to 2016. Whilst the number of children aged 5 – 14 will increase by about 400, the number of older adults aged over 55 years will increase by over 2,500. This suggests that aquatic centres will increasingly be expected to service the needs of this age group.

Key findings of a random telephone survey of 300 residents aged over 15 years were:

- 53% had visited a pool in the previous 12 months. Norwood Swimming Centre was the most popular and Payneham Swimming Centre was the second most popular pool visited. Adelaide Aquatic Centre was the next most popular aquatic centre visited by residents from Norwood Payneham & St Peters.

- 65% who had visited Norwood Swimming Centre lived in postcodes 5067 and 5068.
- 91% who had visited Payneham Swimming Centre lived in postcodes 5069 and 5070.
- The main reasons for using swimming centres were because it was close to home and/or had good facilities. These were also the main reasons for using the Norwood and Payneham Swimming Centres.
- The most popular activities are lap/fitness swimming, recreational swimming, taking children to swim lessons and recreational swimming with children. Lap swimming was the most popular activity for both genders and respondents aged 50+ years. Recreational swimming was the most popular activity for respondents aged 15 – 29 years. Taking children lessons was the most popular activity for respondents aged 30 - 49 years.
- 41% visit swimming pools all year round and 47% in summer only and a significant proportion of respondents visit pools at least weekly.
- The most important features of swimming centre were water quality, location and shade around, and over, pools.
- The main reasons for not using swimming pools related to personal preferences (not interested, don't like swimming), access to other facilities (own or neighbours pool, or use beach) or age and health reasons.
- 73% considered swimming and aquatic facilities in Norwood, Payneham & St Peters Council area were adequate.

Key findings of a survey of 245 users of Norwood and Payneham Swimming Centres were:

- Norwood and Payneham Swimming Centres were used most often followed by Adelaide Aquatic Centre. 4% of Norwood users had visited the Payneham Swimming Centre, and 9% of Payneham customers had visited the Norwood Swimming Centre.
- A substantial proportion of pools users are regular, i.e. at least once per week in either summer or all year round.
- Lap/fitness swimming was by far the most popular activity, followed by recreational swimming. Both pools had similar activity profiles, although Payneham customers appear to have greater emphasis on lap/competition swimming. Norwood customers seem to spend more time recreational swimming by themselves or with children.
- Outdoor 50m lap/competition pool is very important to users, with other aquatic components receiving a much lower importance rating. Customers at Payneham consider lap/competition pools are more important than Norwood customers. A leisure/fun pool and diving pool were the only two components which Norwood customers considered more important than Payneham customers.

Postcode surveys conducted in 2012-2013 and 2014-2015 found a very high proportion of users of both pools live within the City of Norwood Payneham & St Peters. The Payneham Swimming Centre is also used by a significant number of residents of the Cities of Port Adelaide Enfield and Campbelltown.

Consultation with a range of stakeholders indicated that both Centres are highly regarded by the local communities, particularly the Norwood Swimming Centre. Both Centres have deficiencies relating to the amount of shallow water and amenities for swimmers, instructors and spectators.