Suffolk: Economic Assessment of the Sport and Physical Activity Sectors

Making Suffolk ENGLAND’S MOST ACTIVE COUNTY
Suffolk County Council

Suffolk: Economic Assessment of the Sport and Physical Activity Sectors

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Foreword

Undoubtedly, sport and physical activity is integral to Suffolk life. Not only is it essential to the health and wellbeing of the whole community it also makes an important contribution to the local economy in terms of spending, output and employment.

Despite this, the contribution that sport makes to the economy has not, to date, been fully acknowledged. It is therefore essential that we fully understand the potential of the Sport and Physical Activity sector in Suffolk and work collaboratively to maximise its contribution to the economy.

The publication of Sporting Futures, the Government’s strategy for an active nation, has re-defined what success in sport looks like by concentrating on five key outcomes. One of which is economic development.

The Government maintains that ‘Sport and physical activity have not traditionally been supported in the same way as other parts of the economy’ and ‘with sport and physical activity contributing £39bn to the UK’s GDP and with one million people employed in the sport and physical activity sectors, ensuring that this sector of the economy is effectively supported is crucial for government.’

Furthermore, they state that, ‘a stronger and more successful sporting economy can help meet customer needs more effectively, and a strong demand from the public for opportunities to take part in sport and physical activity will also help drive the economy. This is on top of the direct benefit for the UK of additional jobs and economic activity.’

The Government is unequivocal that ‘there is untapped potential in the sport and physical activity sectors.’

This assessment speaks directly to this strategy, capturing the scope and impact of the sector in Suffolk. Its purpose is to act as a catalyst to bring together key agencies and individuals to further tap the potential of the sport and physical activity sector in Suffolk going forward. In doing so, it will not only support our collaborative long-term ambition for Suffolk to become the most active county in England but, importantly, also further support and grow the Suffolk economy.

Cllr James Reeder

Cabinet Member for Health

Suffolk County Council
# Suffolk Most Active County: Economic Assessment of the Sport and Physical Activity Sectors

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Executive Summary

i. Suffolk has an ambition to become the most active county in the country. The Most Active County partnership was established in 2012 to work towards this. The partnership involves key agencies and organisations collaborating to bring added value to the work that many organisations across Suffolk are doing to address physical inactivity.

ii. To improve on their current standing, the County Council has identified a need to develop, grow and encourage investment in the Sport and Physical Activity economic sectors. This will require the Most Activity County partnership to engage with a broader range of projects and stakeholders than it has done previously.

iii. Hatch Regeneris were commissioned to begin this work by undertaking a comprehensive economic assessment of the Sport and Physical Activity sectors in the county. The four key aims of the commission were to:

1) Provide a detailed overview of the Sport and Physical Activity sectors in Suffolk
2) Assess the value and position of the Sport and Physical Activity sectors in Suffolk
3) Identify major opportunities and future drivers of growth for the Sport and Physical Activity sectors in Suffolk
4) Propose a series of recommendations to help grow and develop the sectors in Suffolk

The work will be used to broker relationships with key stakeholders across the region and to develop an appropriate action plan with associated governance structures.

iv. The work highlights that the Sport and Physical Activity sectors are the highest performing sectors in Suffolk in terms of growth and specialisation. It also shows that there are significant opportunities for further growth and that it makes sense for partners across the public and private sectors to work together to capitalise on these and to accelerate its current positive trajectory.

v. The rest of this section provides a high level summary of key messages emerging from the work.

Sector Analysis

Sport and Physical Activity makes an important contribution to the Suffolk economy…

vi. Analysis shows that employment in the Sport and Physical Activity sectors has grown at a faster rate than for all other sectors and in comparison to the sector growth seen at the regional and national scales. Over the last five years employment has grown by nearly 60% to over 10,000 employees. Evidence shows that this has been driven primarily by employment growth associated with activities of sports clubs.

vii. It is also the most specialised sector in Suffolk and is a strength of the county’s economy alongside business support, transport, construction and retail. The sector is almost two times more specialised than the national average in terms of employment.

viii. The figure below demonstrates the size, scale and growth of the sector.
Suffolk’s skill profile matches the needs of the sector, but there are several skills gaps…

ix. Evidence demonstrates that Suffolk has a broad skills profile with a more even split of qualification levels when compared to the East of England and England as a whole. For example, a lower proportion of residents have a university level qualification compared to England (NVQ Level 4 or higher), but a higher proportion have NVQ Levels 3, 2 and 1 (i.e. GCSEs and A-Levels).

x. This broad profile suits the needs of the sector well as it is made up of a wide range of roles that require different skill levels – from highly skilled technical roles to those than require fewer qualifications. If the sector continues to grow it should therefore provide employment opportunities to a range of different types of people across the county.

xi. The sector is also supported by a range of education institutions and courses which helps support its development and evolution. Consultation, however, indicates that there are several skills gaps that will need to be filled in order for the sector to grow. Examples include:

- **Leisure facility operation:** relevant skills needed for operating leisure centres and sports facilities are lacking, with further and higher education placing a greater focus on more technical sports science skills for the sector. Transferable “people” skills and business management skills have been identified as desirable for employers in the sector. In addition, specific high skilled jobs in managing facilities is lacking in some areas (e.g. a shortage of pool engineers).

- **Coaching and training:** while a range of qualifications are available for sports coaching, consultation indicates that there is a shortage of participation due to the perception of low pay and lack of clarity on career progression.

**Participation is in line with regional and national averages, but sickness absences are high which has economic implications…**

xii. Our work shows that participation levels in Suffolk are in line with regional and national averages, but there is an opportunity to increase it across the county. While 67% of people aged
19 or over regularly undertake the recommended level of physical activity, around a fifth of residents are classified as physically inactive. This has economic implications because physical activity delivers health benefits which can reduce expenditure on health services, increase the size of the available workforce, reduce the number of working days lost to sickness and, ultimately, increase productivity. This is particularly pertinent to Suffolk because the county has the highest proportion of days lost to sickness in the East of England. Just under 2% of all working days are lost to sickness absence compared to around 0.75% in Southend, Hertfordshire and Cambridgeshire.

Opportunities

There are a range of opportunities to grow and develop the sector which should help to stimulate economic activity and influence participation...

The report sets out a number of opportunities that could contribute to the future growth and development of the sector in Suffolk. These are based on consultations and the baseline assessment of the sector. A brief summary of some of these can be found in the table below. While this is not a comprehensive list of opportunities, it provides a useful overview of where the sector can continue to develop.

<table>
<thead>
<tr>
<th>Opportunities for the Sport and Physical Activity Sectors in Suffolk</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improving participation and boosting productivity</td>
</tr>
<tr>
<td>Sporting events</td>
</tr>
<tr>
<td>New sporting venue</td>
</tr>
<tr>
<td>Future drivers of growth</td>
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</tbody>
</table>
at global and national scales. This growth presents a number of opportunities for development and innovation in the sector. The report discusses some key trends that are likely to drive the future growth of the sectors, including:

- Data is becoming a bigger part of the sectors (e.g. through wearable devices and the emergence of the quantified self)
- New technologies are becoming increasingly prominent across the sector (e.g. Augmented and Virtual Reality)
- Technology is influencing sport consumption and participation
- Changing demographics and lifestyles are driving developments around nutrition and equipment

As set out in the table below, many of these opportunities align with the strategic priorities of the New Anglia LEP. When this is set alongside the fact that the sector is the most specialised and fastest growing in the county, it is clear that the LEP, County Council and partners should view the sector as important and as part of future thinking.

<table>
<thead>
<tr>
<th>Priority</th>
<th>Relationship to Sport and Physical Activity Sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>Life sciences and biotech</td>
<td>Genetic profiling and data self</td>
</tr>
<tr>
<td>Technology and digital creative</td>
<td>Wearable devices, augmented reality, virtual reality</td>
</tr>
<tr>
<td>Visitor economy</td>
<td>Sporting events (e.g. Ironman, fully-accessible sporting events, multi-sport coastal event) and new sporting venue</td>
</tr>
<tr>
<td>Construction and development</td>
<td>New sporting venue and significant upgrades to existing leisure facilities (e.g. in Deben and Felixstowe)</td>
</tr>
<tr>
<td>Advanced agriculture, food and drink</td>
<td>Sports nutrition</td>
</tr>
<tr>
<td>Advanced manufacturing and engineering</td>
<td>Biomimetics and equipment manufacturing</td>
</tr>
</tbody>
</table>

Recommendations

Partners need to work together to support and accelerate the sector's positive trajectory...

The report sets out that partners should work together to help support the growth of the sector. Interventions will be most effective if led and driven by a range of different stakeholders from across the county. While Suffolk County Council and the Most Active County partnership have key facilitative and catalytic roles to play, growth and change will require buy-in and ownership from partners.

Following consultation with stakeholders a broad set of recommendations have been put together to guide future activity. The following recommendation grouping have been identified to structure them:

1) Infrastructure
2) People, participation and productivity

3) Enterprise

The recommendations have been set against each of these groupings with suggested leads and stakeholders. These will need to be worked up and developed into formal projects and a comprehensive action plan will need to be co-ordinated.

xvii. To avoid unnecessary duplication, it is suggested the existing Most Active County Partnership governance arrangements are utilised to co-ordinate the recommendations. These have recently been refreshed to reflect a number of strategic changes at national and local scales – the structure now includes an overarching Strategic Group and three thematic Delivery Groups. As shown in the figure below, it is recommended that the three Delivery Groups take responsibility for the different recommendation groupings from this report. The attendee lists for each of these groups will need to be reviewed to take into account the key stakeholders identified for the relevant recommendations.
1. **Introduction**

1.1 Suffolk has an ambition to become the most active county in the country.

1.2 The County Council set up the Most Active County partnership in 2012 to achieve this and ensure the London Olympic and Paralympic games had a legacy in the region.

1.3 The partnership involves key agencies and organisations collaborating to bring added value to the work that many organisations across Suffolk are doing to address physical inactivity.

1.4 The programme has catalysed a range of projects across the county which have helped to increase physical activity levels. It is reported that since it was launched:
   - 9,500 more adults are active
   - 27,500 more adults are participating in sport and active recreation at least three times a week
   - 29,000 more adults are walking for at least ten minutes at least five times a week
   - 9,500 more adults are cycling at least once a week

1.5 The council state that Suffolk is now the 18th most active county in the country (out of 27)\(^1\).

1.6 To improve on their current standing, Suffolk County Council has identified a need to develop, grow and encourage investment in the Sport and Physical Activity economic sectors. This will require the Most Activity County partnership to engage with a broader range of projects and stakeholders.

1.7 Hatch Regeneris has been commissioned to begin this work by undertaking a comprehensive economic assessment of the Sport and Physical Activity sectors in the county. The four key aims of the commission are to:

1) Provide a detailed overview of the Sport and Physical Activity sectors in Suffolk

2) Assess the value and position of the Sport and Physical Activity sectors in Suffolk

3) Identify major opportunities and future drivers of growth for the Sport and Physical Activity sectors in Suffolk

4) Propose a series of recommendations to help grow and develop the sectors in Suffolk

The intention is to use the work to broker relationships with key stakeholders across the region and to develop an appropriate action plan with associated governance structures.

1.8 The rationale for this piece of work is ensure that key organisations understand the role of the sectors in the regional economy and to help them better support its growth and future direction.

**Study Scope**

1.9 This study provides a comprehensive overview of the Sport and Physical Activity sectors in Suffolk. It begins by providing an analysis of the sectors and then considers the economic opportunities that exist. This is followed by a series of recommendations for consideration. The report is structured around the following themes:

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\(^1\) Based on data from Sport England (2015)
• Study Background
• Sector Analysis
• Economic Opportunities
• SWOT Assessment
• Recommendations
2. Study Background

2.1 This study has been informed by a review of relevant research, policy and strategy at regional and national scales. This provides an overview of where Suffolk currently is, a platform on which to build and a framework when considering future strategy. A summary of the most relevant information is provided below.

Sport and Physical Activity

2.2 Sport and physical activity deliver a wide range of social and economic benefits.

2.3 In terms of social benefits, according to Public Health England (2016) regular physical activity\(^2\) can reduce an individual’s risk of:

- Dementia by up to 30%
- Hip fractures by up to 68%
- Depression by up to 30%
- Breast cancer by 20%
- Colon cancer by 30%
- Type 2 diabetes by up to 40%
- Cardiovascular disease by up to 35%
- All-cause mortality by 30%

When considered collectively these benefits can have wider societal impacts.

2.4 In terms of economic benefits, the Sport and Physical Activity sectors generate employment and contribute to the economy via production, participation and consumption. Economic benefits accrue through the:

- Production and purchase of sporting equipment
- Attendance at sporting events and fixtures
- Membership of sports and leisure clubs
- Production and purchase of sportswear
- Betting and gambling on sporting events and fixtures

2.5 According to Sport England’s *Economic Value of Sport for England* (2012), the sport sector supports over 440,000 full time jobs and contributes £20.3 billion in GVA to the national economy. Economic contributions by different types of activity are displayed in the table below.

\(^2\) Defined as at least 150 minutes of moderate intensity activity in bouts of ten minutes or more each week (for Adults 19-64)
<table>
<thead>
<tr>
<th>Participation</th>
<th>£4.9bn</th>
<th>£4.4bn</th>
<th>£1.2bn</th>
<th>£1.2bn</th>
<th>£0.08bn</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sport Education / Voluntary Provision</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Sport / Class Subscription Fees</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sports Equipment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Participation Sports</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sportswear (to play in)</td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>

**Table 2.1 Contribution of Different Sporting Activities to England's Economy (2010)**

**Consumption**

<table>
<thead>
<tr>
<th></th>
<th>£4.4bn</th>
<th>£1.1bn</th>
<th>£1.5bn</th>
<th>£0.4bn</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV/Satellite Subscription</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sports Related Gaming and Betting</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spectator Sports</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sports Equipment (Leisure)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sportswear (Leisure)</td>
<td></td>
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</tbody>
</table>


2.6 The social and wellbeing benefits of sports and leisure can also have broader positive economic impacts. This is because improved health and wellbeing can reduce public expenditure on health services, increase the size of the available workforce, reduce the number of working days lost to sickness and, ultimately, increase productivity. Sport England’s *Economic Value of Sport for England* (2012) reports that the health and wellbeing benefits of sport and physical activity is worth £11.2 billion to the nation’s economy and participation in sport delivers £1.7 billion in terms of savings to the NHS through reduced sickness.

2.7 Despite this, outside of funding for elite sport the general Sport and Physical Activity sectors have not been supported in the same way as other parts of the economy by successive governments. This is because the direct economic benefits are perceived to be lower value when compared with other high-profile sectors (e.g. finance, science and technology) and the wider economic benefits are not well understood and difficult to quantify. This is recognised in the government’s *Sporting Future Strategy* (2015), which is discussed later.

**Suffolk County Council Priorities**

2.8 Suffolk County Council recently published its *Our Priorities 2017-2021* report which sets out their three main priorities:
1) Inclusive Growth: Improve the county’s economic productivity, build more homes and increase levels of educational attainment.

2) Health, Care and Wellbeing: Care for Suffolk’s vulnerable residents and enable everyone to live long, healthy and fulfilling lives.

3) Efficient and Effective Public Services: Change the way the council operates to meet customers’ needs and expectations during a time of diminishing resources.

2.9 The Inclusive Growth priority discusses building on the council’s existing relationship with the Local Enterprise Partnership (LEP) to support business growth and unlock potential for greater economic growth in Suffolk. It also sets out an aspiration to continue working with business and education providers to develop the skills needed for future growth, including expanding the Apprenticeships Suffolk Network.

2.10 The Health, Care and Wellbeing priority sets out that while Suffolk is a comparatively healthy place, the council want to improve mental and physical health and improve people’s ability to live longer. The link between economic growth and health is recognised:

“Suffolk County Council understand that strong, productive and sustainable local economies need strong healthy and empowered communities and vice versa. They support each other, creating continuous inclusive growth”.

2.11 Improving participation in sport and physical activity and encouraging growth within the Sport and Physical Activity sectors could directly contribute to both of these priorities due to the social and economic benefits it can bring. This piece of work considers the value such action could have on these priorities and the approaches that can be taken to support them.

**Suffolk Public Health Context**

**Annual Public Health Report (2017)**

2.12 Each year Suffolk County Council produces a Public Health Report, which provides a picture of the county's current health and wellbeing position and how this relates to the council’s priorities.

2.13 The most recent report explicitly recognises the link between economic growth and wellbeing. It states:

“Poverty can increase the chances of living in poor health. People living in more deprived communities in Suffolk will, on average, live shorter lives and experience greater physical and mental ill health than those in less deprived communities… Poor health can also drive poverty; being in poor health makes it harder to find and stay in work”.

2.14 This message is conveyed via their ‘infinity cycle’ (see figure below), which is based on the principles in the council’s **Our Priorities 2017-2021** document.

2.15 As outlined in the table below, the 2017 report addresses a number of key questions related to the council’s priorities. A number of messages are delivered to illustrate where the county currently is and what needs to be done to improve its position. Some of the key messages that are of relevance to this piece of work include:

- Wages in Suffolk are lower than average
- Suffolk has above average levels of people in lower paid professions
- Educational attainment in Suffolk is relatively low
- The natural environment is one of Suffolk’s key strengths
- Suffolk has low levels of productivity

These messages are based on analysis of data from a range of sources.

2.16 **This piece of work explicitly relates to the messages and priorities set out in the annual report as it explores the role that the Sport and Physical Activity sectors could have in addressing a number of these concerns and what recommendations and actions could be undertaken.**

**Figure 2.2 Inclusive Growth and Health and Care ‘Infinity Cycle’**

Source: Suffolk Annual Public Health Report
Table 2.2 Key Messages from the Annual Public Health Report (2017)

| Who is working and what does this mean for health? | Unemployment rates in Suffolk are lower than average but wages are lower than average  
The proportion of working age residents is low  
The non working-age population is likely to increase over the next twenty years and people are likely to live longer  
**Action Point: Create better quality jobs to reduce health inequality and ensure older people stay healthy, independent and productive** |
| How is the economy structured and what does this mean for jobs and health? | Suffolk has a lower proportion than average of people working in the highest paid professions  
Suffolk has above average levels of people in lower paid occupations (e.g. process, plant and machinery and elementary occupations)  
Those in lower paid occupations often have much lower levels of skills and a higher prevalence of certain health risk behaviours  
98.5% of businesses in Suffolk are SMEs and few employees in SMEs are focused on well-being and health  
**Action Point: Suffolk needs to work collaboratively to support the workplace health and the work-life balance of small and medium size enterprises in Suffolk** |
| Do people face health and care related barriers to work in Suffolk, and what help does the working population in Suffolk need to overcome them? | Good quality work improves health and wellbeing  
Workers in routine and manual roles are at risk of poor health because of the physical nature of their work  
Ethnic minorities and disabled people are more likely to experience poor working conditions including low pay  
**Action Point: Suffolk needs to improve the health of the working population, particularly for those in routine and manual labour** |
| What education and skills do people have in Suffolk and what does this mean for jobs and health? | Educational attainment is relatively low  
Funding for education is relatively low  
Developing Suffolk Talent is a programme actively supporting economic and skills growth in the region  
Programmes are also required for older people to help get them back into work  
**Action Point: Improve education and provide the right support to develop skills to motivate, encourage and sustain a healthy workforce** |
| Is Suffolk an attractive place to live and work, and what does this mean for jobs and health? | The natural and historic environment is one of Suffolk’s key strengths and access to green and open space is important for health  
House prices are rising against a paucity of high paid employment  
The availability of affordability of high quality homes can reduce the demand on social care and health services  
**Action Point: The environment needs to be maintained and enhanced as it plays a crucial role in both personal wellbeing and inclusive growth** |
| How productive is Suffolk and what does this mean for jobs and health? | Suffolk’s productivity levels are low, which is likely to link to the low wage and skill profile  
Suffolk residents earn less that the Eastern region and Great Britain as a whole  
There is a clear link between health and productivity  
**Action Point: Raising productivity in Suffolk is vital in attracting investment as well as spending the Suffolk pound in Suffolk** |
Suffolk in Twenty Years Time

2.17 Building on the Public Health Annual Report, Suffolk County Council recently undertook an analysis of the county’s social and demographic profile and considered how it could change over the next twenty years. The purpose was to provide intelligence to help council services plan their activity over the short, medium and long term.

2.18 Structured around the council’s strategic priorities, the report outlines that Suffolk is currently quite healthy – it has a higher life expectancy than the rest of the country and is within the least deprived third of all local authorities³.

2.19 However, the document demonstrates that the total population is forecast to increase by 10% over the next twenty years and that the proportion of older people (>65) will increase by 50%⁴. Using a range of data sources and assumptions it is reported that this could:

- Almost double the number of people living with dementia from 13,000 in 2015 to 24,300 by 2035
- Increase the number of hospital admissions by 33,000 over the next twenty years which could require an additional 792 acute beds
- Increase the prevalence of depression by 6000 people between 2017-2037

2.20 One of the key recommendations of the report is to “prevent everything which is possible to prevent”. This lends itself to this piece of work because, as previously set out, growing and increasing participation in the Sport and Physical Activity sectors can improve health and reduce reliance on health and social care.

2.21 Related to this, the report also highlights that adult skill levels are below national levels and that this correlates with lower than average levels of weekly pay⁵. While the employment rate is higher than average, productivity (GVA per worker) is low and the gap between the Suffolk and national level is forecast to increase from £2.9bn in 2017 to £4.5bn in 2037⁶. This is also relevant to this piece of work as the role of increasing participation in Sport and Physical Activity on worker productivity will be considered.

Suffolk County Sports Facilities Framework

2.22 In 2017 Suffolk County Council and Sport England commissioned Neil Allen Associates to develop a Suffolk County Sports Facilities Framework. The work had a number of objectives, but the primary three were:

- To provide coherence between individual local authority sports facilities strategies and seek to add value to them by assessing them from a county perspective

³ Based on data from Public Health England
⁴ Based on ONS sub-national population projections (2014)
⁵ Based on Annual Population Survey (2015) and Annual Survey of Hours and Earnings (2016)
⁶ Based on East of England Forecasting Model (2016) and represents the difference in total GVA Suffolk would produce if productivity per worker was at the UK average
• To identify the district and cross boundary scope for project development, investment and management opportunities for sports facilities that have a ‘greater than local’ significance
• To plan and provide facilities at all scales on a cross boundary basis

2.23 The research demonstrates that if local authority sports facility strategies are delivered in isolation then it could result in the over provision of facilities in some areas and under provision in others. It also found that fewer facilities may be needed to meet consumer demand in some areas if a more joined up approach is taken.

2.24 It also found that national policy and consumer demand is increasingly focusing on a wider range of facilities and the use of the natural environment for physical activity. Examples of emerging activities that rely on less traditional facilities include dancing, walking, exercise classes, climbing, parkour and skating.

2.25 A number of recommendations were made following the research. The two most relevant for this piece of work are:

1) Provide a major indoor sports hall venue of at least 8-12 badminton courts scale to meet community needs across local authority areas and serve as an events venue for indoor sport
2) Provide a 50m swimming pool to meet community needs – its location should serve more than one local authority area

The report emphasises that these two recommendations could be considered as one project.

2.26 This piece of work will recognise the findings and recommendations of the framework by mapping the provision of different types of sport and leisure facilities and by considering the potential economic impacts of a new major sporting venue that serves the needs of residents of more than one local authority area.

Wider Context

Government Strategy

2.27 The government published their sports and physical activity strategy, Sporting Future: A New Strategy for an Active Nation, in December 2015. The strategy presents the government’s approach to tackling inactivity and sets out a framework for development.

2.28 The strategy aims to go beyond assessing how many people participate in sport and physical activity. It sets out that funding decisions will be made based on the social good that proposals can deliver. As the figure below illustrates, success is defined by five core outcomes: physical wellbeing, mental wellbeing, individual development, social/community development and economic development.

2.29 This approach resonates with this piece of work, which considers the role that the Sport and Physical Activity sectors can play in economic development and increasing productivity through things like improved physical and mental wellbeing.

2.30 The economic impact of sport is seen as a fundamental part of the new strategy and government emphasise that they will ask organisations to not only consider how they contribute to the nation’s health and/or wellbeing, but also to the local and national economy. The strategy says: 
In the past, the economic value of sport has been looked at completely separately to the other public benefits sport can deliver. A significant proportion of the £39bn sport contributes to the UK’s GDP comes from grassroots sport, the millions of people who buy trainers, bikes, gym memberships or pay match fees. The government’s investment of £10m in the Tour de France Grand Départ in 2014 helped unlock a £125m contribution to GDP. So the UK’s economic success is bound up with our sporting engagement, and vice versa. Sport also plays a huge role in supporting the GREAT Britain campaign to promote the UK abroad and the UK was ranked top in a recent analysis of global soft power”.

**Figure 2.3 Government’s Sport Strategy Framework**


**Sport England Strategy**

2.31 Sport England released its strategy, *Sport England: Towards an Active Nation 2016-2021*, in May 2016. It focuses on putting the government’s *Sporting Future* strategy into practice by making a number of changes to their current approach:

- Focusing more money and resources on tackling inactivity because this is where the gains for the individual and for society are greatest
- Investing more in children and young people from the age of five to build positive attitudes to sport and activity as the foundations of an active life
- Helping those who are active now to carry on, but at lower cost to the public purse over time
- Putting customers at the heart of what is done, responding to how they organise their lives and helping the sector to be more welcoming and inclusive, especially of those groups currently under-represented in sport
- Helping sport to keep pace with the digital expectations of customers
• Working nationally where it makes sense to do so (for example on infrastructure and workforce) but encouraging stronger local collaboration to deliver a more joined-up experience of sport and activity for customers
• Working with a wider range of partners, including the private sector, using Sport England’s expertise as well as their investment to help others align their resources
• Working with the sports sector to encourage innovation and share best practice particularly through applying the principles and practical learning of behaviour change

2.32 As a key funder of sport and sporting infrastructure, it is important to note that a clear ‘line of sight’ between each investment and the contribution it can make to the overarching outcomes outlined in Sporting Future has been developed. KPIs directly related to the outcomes have been created to ensure that investments make a wider social, economic and wellbeing impact. This holistic approach is of relevance to the aspirations of this piece of work.

**Most Active County Partnership**

2.33 The Most Active County partnership is a collaboration of key agencies and organisations that have committed to work together to bring added value to the work that many organisations across Suffolk are doing to address physical inactivity.

2.34 The partnership estimate that the current level of inactivity is responsible for:
• 1,368 years of poor health being lived by the Suffolk population each year
• 244.6 premature deaths per 100,000 people per year
• An economic burden of £17.7m per 100,000 people

2.35 Launched in February 2012, the partnership recognises that the inactivity agenda is beyond the scope of any single agency and that effective partnerships are fundamental to successfully increasing activity. Those involved include county, district and borough councils, the county sports partnership (Suffolk Sport), the voluntary and community sector, leisure trusts and health agencies.

2.36 The broad themes of the Most Active County partnership are:
• Addressing inequalities in sport and physical activity participation
• Providing a universal offer for the community
• Maximising the economic impact for Suffolk from efforts to grow participation in sport and physical activity

2.37 The partnership has recently undergone a review in order to respond to the recommendations of the recently published Suffolk Physical Activity Needs Assessment. The new structure specifically recognises the importance of economic development and infrastructure (amongst other things) in addressing inactivity levels in the county going forward and includes a delivery group providing a more formal basis for cross-agency collaboration in this area. This economic assessment provides important foundations for this work going forward.

**Norfolk and Suffolk Economic Strategy**

2.38 The New Anglia LEP is a business-led collaboration between the private, public and education sectors across Suffolk and Norfolk. They recently published their Economic Strategy, which
examines the composition of the local economy, identifies themes and priority places for investment and sets targets to measure future growth.

<table>
<thead>
<tr>
<th>LEP Targets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creation of 88,000 new net jobs by 2036</td>
</tr>
<tr>
<td>Delivery of 140,000 new homes by 2036</td>
</tr>
<tr>
<td>£17.5 billion growth in the economy by 2036</td>
</tr>
<tr>
<td>30,000 new successful businesses by 2036</td>
</tr>
</tbody>
</table>

2.39 The LEP identify nine key sectors for future growth: energy; life sciences and biotech; ICT, tech and digital creative; advanced agriculture, food and drink; visitor economy; financial services and insurance; transport, freight and logistics; construction and development; and, advanced manufacturing and engineering.

2.40 While the Sport and Physical Activity sectors are not explicitly identified, there are sub-sectors and activities associated with them that link to the sectors outlined above. For example, as will be discussed later in the report:

- Sporting events and activities relate to the visitor economy
- Developments in sports nutrition, energy drinks and alternative diet products relate to advanced agriculture, food and drink
- The growth around wearable technology, virtual reality and augmented reality for sport and physical activity presents opportunities for the ICT, tech and digital creative sectors
- New sporting venues can contribute to the growth of the construction and development industries

2.41 Any discussions with the LEP will need to be cognisant of this and the four priority themes outlined in the table below. Opportunities for growth within the Sports and Physical Activity sectors are discussed later in this report and are considered with these sectors and priorities in mind.

Table 2.3 New Anglia LEP’s Priority Themes

<table>
<thead>
<tr>
<th>Priority Themes</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Our offer to the world</td>
<td>“Improving and communicating a clear, ambitious offer to the world is central to all our ambitions and targets and to attracting the people, investors and businesses of the future”</td>
</tr>
<tr>
<td>Driving inclusion and skills</td>
<td>“Our people, whether in traditional careers, micro businesses, arts and culture or supporting others in the community, are central to all our ambitions and goals. We want to raise and support aspiration across all ages. Good progress has been made in raising skill levels, but we want to go further and faster, particularly for those already in work. We will help our young people set their ambitions high and understand the exciting local careers available to them”</td>
</tr>
<tr>
<td>Collaborating to grow</td>
<td>“The competition we face does not come from within Norfolk and Suffolk. Many of the opportunities we have come from our proximity to Cambridge and London as well as global markets. The new markets and investment opportunities we seek are national and global”</td>
</tr>
<tr>
<td>Competitive clusters close to global centres</td>
<td>“Within our business sectors, Norfolk and Suffolk have a number of recognised national and global clusters of business, with excellent access to national and global markets and to London and Cambridge”</td>
</tr>
</tbody>
</table>

Source: Norfolk and Suffolk Economic Strategy (2017)
2.42 It should also be recognised that the LEP has six priority locations for investment across the region: Ipswich, Norwich and Greater Norwich, Norfolk and Suffolk Energy Coast, Cambridge-Norwich Corridor, East-West Corridor and King’s Lynn. Any proposals and discussions with the LEP would need to consider linkages with one or more of these locations.
3. Sector Analysis

Sector Definition

3.1 The Sport and Physical Activity sectors encompass a wide range of business and employment activities that can be categorised by participation, consumption and production activities.

3.2 To define the sectors for this study Hatch Regeneris have used Standard Industrial Classification (SIC) code definitions, specific descriptions used to describe a company’s planned activity. SIC Codes are designated by the owner at company formation, using only the description of activity stated to assign the best fit for the company.

3.3 Hatch Regeneris have considered SIC code definitions from the Department of Media, Culture and Sport (DCMS), Sport England and the Office of National Statistics (ONS). The definition that has been used for this piece of work draws on each of them (see table below), but certain activities have been excluded where there is ambiguity over their contribution to the sector and where they do not directly link to physical activity.

3.4 This definition has been used to undertake the statistical mapping of the Sports and Physical Activity sectors and to inform supporting qualitative analysis. The rest of this chapter provides a detailed overview of the sectors and the role they play in the regional economy.

<table>
<thead>
<tr>
<th>SIC Code</th>
<th>Activity Description</th>
<th>DCMS</th>
<th>Sport England</th>
<th>ONS</th>
<th>Regeneris</th>
</tr>
</thead>
<tbody>
<tr>
<td>85510</td>
<td>Sports and recreation education</td>
<td>✓</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>93110</td>
<td>Operation of sports facilities</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>93120</td>
<td>Activities of sport clubs</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>93130</td>
<td>Fitness facilities</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>93191</td>
<td>Activities of racehorse owners</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>93199</td>
<td>Other sports activities</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>47640</td>
<td>Retail sale of sporting equipment in specialised stores</td>
<td>✓</td>
<td>✓</td>
<td>✗</td>
<td>✓</td>
</tr>
<tr>
<td>77210</td>
<td>Renting and leasing of recreational and sports goods</td>
<td>✓</td>
<td>✓</td>
<td>✗</td>
<td>✓</td>
</tr>
<tr>
<td>60200</td>
<td>Television programming and broadcasting activities</td>
<td>✗</td>
<td>✓</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>92000</td>
<td>Gambling and betting activities</td>
<td>✗</td>
<td>✓</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>30120</td>
<td>Building of pleasure and sporting boats</td>
<td>✓</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
</tr>
<tr>
<td>32300</td>
<td>Manufacture of sports goods</td>
<td>✓</td>
<td>✓</td>
<td>✗</td>
<td>✓</td>
</tr>
</tbody>
</table>
The Sport and Physical Activity sector is better represented than in wider geographies and is comparable in size to other key sectors…

3.5 The Sport and Physical Activity sector is made up of around 10,000 jobs in Suffolk, which represents 3% of all employment. The sector is the tenth largest in Suffolk and is relatively small compared to others.

3.6 That said, the proportion of Suffolk’s employment in the Sport and Physical Activity sector is almost double the proportion at the national level and across the rest of the East of England (not including Suffolk). It is one of only three sectors in Suffolk that accounts for a larger proportion of employers than the wider geographies.

3.7 The sector is also similar in size to traditionally well established and high value sectors. For example, employment in the sector is larger than the ICT & Digital and Creative sectors in Suffolk and is comparable to the average proportion of Transport and Wholesale employment usually found in the East of England and England.
Employment in the sector has grown at a faster rate than all other sectors in Suffolk and faster than the Sport and Physical Activity sector in wider geographies…

3.8 Employment in the Sport and Physical Activity sector has grown by nearly 60% over the last five years, generating an additional 3,600 jobs for Suffolk’s economy. This accounts for around a quarter of all employment growth in Suffolk over the last five years.

3.9 The sector has grown faster than all other sectors in Suffolk and at a higher rate than the average for both the East of England and England. It is one of only two sectors in Suffolk’s economy that has outperformed both comparator geographies in terms of proportional growth.
The Sport and Physical Activity sector is the highest performing sector in Suffolk in terms of specialisation and growth...

3.10 The composition and recent performance of Suffolk’s economy is displayed in the chart below. It highlights absolute employment levels (the size of the bubble), recent growth (vertical axis) and level of specialisation (i.e. share of total employment) vs England (horizontal axis).

3.11 Analysis highlights that the Sport and Physical Activity Sector has performed most strongly in comparison to other sectors, with nearly two times the specialisation compared to England and the highest rate of growth (as previously discussed).

3.12 Other key sectors in Suffolk’s economy include:

- **Business Support**: the sector has experienced a high rate of growth in recent years, although it is not highly specialised vs England
- **Transport**: the sector has experienced some growth in recent years and is highly specialised vs England
- **Retail**: some specialisation and growth and the second largest sector in Suffolk’s economy
- **Public Sector**: despite a decline in employment in recent years and no specialisation vs England, the sector is still the largest in Suffolk’s economy
Figure 3.4 Sector Performance in Suffolk

Bubble Size: denotes absolute employment; Largest ten sectors only.

Employment Specialisation: numbers show the specialisation (location quotient) of the sub-sector in an area relative to England. A score above 1 shows higher specialisation of activity in the sub-sector compared to the average in England.

3.13 The table below summarises the employment data used in the graph above and business data.
<table>
<thead>
<tr>
<th>Sub Sector</th>
<th>Employment</th>
<th>Business</th>
</tr>
</thead>
<tbody>
<tr>
<td>No.</td>
<td>Spec*</td>
<td>Change 11-16(^\d)</td>
</tr>
<tr>
<td>Public Sector</td>
<td>75,320</td>
<td>0.9</td>
</tr>
<tr>
<td>Retail</td>
<td>40,150</td>
<td>1.2</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>32,240</td>
<td>1.3</td>
</tr>
<tr>
<td>Finance and Professional</td>
<td>31,970</td>
<td>0.7</td>
</tr>
<tr>
<td>Business Support</td>
<td>30,200</td>
<td>1.1</td>
</tr>
<tr>
<td>Hospitality &amp; Accommodation</td>
<td>27,090</td>
<td>1.0</td>
</tr>
<tr>
<td>Construction</td>
<td>17,710</td>
<td>1.2</td>
</tr>
<tr>
<td>Transport</td>
<td>17,140</td>
<td>1.7</td>
</tr>
<tr>
<td>Wholesale</td>
<td>11,970</td>
<td>0.9</td>
</tr>
<tr>
<td><strong>Sport and Physical Activity</strong></td>
<td><strong>9,900</strong></td>
<td><strong>1.8</strong></td>
</tr>
<tr>
<td>ICT &amp; Digital</td>
<td>7,790</td>
<td>0.7</td>
</tr>
<tr>
<td>Warehousing and Logistics</td>
<td>5,910</td>
<td>1.0</td>
</tr>
<tr>
<td>Other Services</td>
<td>5,680</td>
<td>1.0</td>
</tr>
<tr>
<td>Creative</td>
<td>4,030</td>
<td>0.5</td>
</tr>
<tr>
<td>Grand Total</td>
<td>322,530</td>
<td>-</td>
</tr>
</tbody>
</table>

*Spec (Specialisation)*: numbers show the specialisation (location quotient) of the sector relative to England. A score above 1 shows higher specialisation of activity in the sector relative to the average in England – these are highlighted in blue.  
\(^\d\) % change: percentage growth estimates from small sample sizes are more prone to methodological outliers and should be used with caution. Cells highlighted blue have employment growth of greater than 50% over the last five years.

There is a diversity of sport and physical related activities in Suffolk, although a large proportion of employment involves sports clubs and facilities...

3.14 There are a range of sub-sectors within the Sports and Physical Activity sector in Suffolk, including those associated with clubs, facilities, retail and manufacturing.

3.15 Employment is dominated by activities associated with sports clubs and the operation of sports facilities – the former supports around 3,000 jobs and the latter 2,500. While employment in both has grown since 2011, employment associated with sports clubs has outpaced sports facilities and has overtaken it as the most prominent employment activity within the sector. Research indicates that a large proportion of growth in sports clubs is driven by employment growth within Ipswich Town Football Club.

3.16 Whilst activities of sports clubs and the operation of sports facilities are likely interconnected, a clear distinction exists – the operation of sports facilities provides a service in a fixed premises or location, whereas the operation of sports clubs are facilitating an activity not necessarily fixed to a specific premises or location. There is likely to be some ambiguity given that SIC Code definitions are defined by individual business owners.

3.17 Employment in “other sports activities” is the third largest subsector and has experienced the second highest growth (+150%) of all subsectors. There is a level of ambiguity on what the subsector includes as it captures other sports activities not elsewhere classified. Data shows the majority of employment is located in a small area around Newmarket Races – given that the subsector definition of “activities of racehorse owners” is specific to owners, it’s likely that other racehorse businesses will define themselves under this subsector. This suggests employment related to racehorse activities is captured within “other sports activities” and is therefore significantly higher than the levels presented below.
Renting and leasing of recreation and sports goods has also experienced high proportion growth, driven by new rental businesses in the South East of the county and near Dedham Vale. Renting and leasing for recreational sport is important to support sporting activities using natural assets (such as canoeing) and to capture additional spend from large sporting events (such as cycling).

Business number across all other activities has increased or remain static since 2012.

As the Table 3.3 below shows, Suffolk is specialised for all these sub-sectors in terms of businesses vs England and for many of them in terms of employment.

### Table 3.3 Sport and Physical Activity Sector Sub-Sector Breakdown

<table>
<thead>
<tr>
<th>Sub Sector</th>
<th>Employment</th>
<th></th>
<th>Business</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2016</td>
<td>2011</td>
<td>2016</td>
<td>2011</td>
</tr>
<tr>
<td>Activities of sport clubs</td>
<td>3,000</td>
<td>0.8</td>
<td>150</td>
<td>1.7</td>
</tr>
<tr>
<td>Operation of sports facilities</td>
<td>2,500</td>
<td>4.1</td>
<td>60</td>
<td>1.1</td>
</tr>
<tr>
<td>Other sports activities</td>
<td>1,500</td>
<td>0.9</td>
<td>120</td>
<td>2.0</td>
</tr>
<tr>
<td>Retail sale of sporting equipment</td>
<td>800</td>
<td>4.1</td>
<td>70</td>
<td>1.2</td>
</tr>
<tr>
<td>Sports and recreation education</td>
<td>700</td>
<td>3.4</td>
<td>50</td>
<td>1.3</td>
</tr>
<tr>
<td>Fitness facilities</td>
<td>500</td>
<td>1.5</td>
<td>40</td>
<td>1.3</td>
</tr>
<tr>
<td>Renting/leasing of rec. &amp; sports goods</td>
<td>400</td>
<td>2.0</td>
<td>20</td>
<td>1.2</td>
</tr>
<tr>
<td>Manufacture of sports goods</td>
<td>230</td>
<td>1.0</td>
<td>20</td>
<td>1.7</td>
</tr>
<tr>
<td>Activities of racehorse owners</td>
<td>180</td>
<td>11.5</td>
<td>170</td>
<td>5.3</td>
</tr>
<tr>
<td>Building of pleasure &amp; sporting boats</td>
<td>100</td>
<td>3.6</td>
<td>10</td>
<td>1.7</td>
</tr>
<tr>
<td>Total</td>
<td>9,900</td>
<td>1.8</td>
<td>690</td>
<td>1.8</td>
</tr>
</tbody>
</table>

Source: BRES, 2017; UKBC, 2018

*Spec. (Specialisation): numbers show the specialisation (location quotient) of the sub-sector relative to England. A score above 1 shows higher specialisation of activity in the sub-sector compared to the average in England – these are highlighted in blue.

^ % change: percentage growth estimates from small sample sizes are more prone to methodological outliers and should be used with caution. Cells highlighted blue have employment growth of greater than 50% over the last five years.
Most Sport and Physical Activity employment is concentrated in a small number of districts...

3.21 Sport and Physical Activity employment is spread across the county, but the majority is concentrated in the districts of Forest Heath (24%), Ipswich (22%) and, to a lesser extent, Suffolk Coastal (15%). Mid Suffolk has the smallest proportion of sector employment (7%) despite being home to 12% of the working age population.

3.22 All districts have experienced growth in the sector in the last five years, with the majority growing by over 50%. Employment in Babergh has nearly doubled in the last five years, with an additional 540 jobs in the district.

Figure 3.6 Total Employment in Sport and Physical Activity Sector by district, 2016

![Graph showing employment by district]

Source: BRES, ONS, 2017

Sector activity is distributed across the county, with strong clusters of activity in and around the main town centres...

3.23 At the county level sector activity is dispersed, but mainly concentrates around main town centres (see Figure 3.7). Sport and physical activities are also found in more rural areas, although there remain large pockets with little or no representation (for example, towards the north west of Babergh district and in northern areas of Mid Suffolk district).

3.24 Other clusters of sports and physical activity employment include: a large corridor of sports and physical activity employment along the A14 from Bury St Edmunds to Ipswich; a corridor heading eastward from Ipswich along the A1214; a concentration east of Halesworth in the Suffolk Coast National Nature Reserve; and a large concentration around Newmarket racehorses.

3.25 Further mapping undertaken as part of this research shows that there are several spatial trends related to the sub-sectors previously discussed:

- Activity related to racehorse activities is concentrated in Newmarket which is home to the Newmarket Racecourses
- Employment associated with sports clubs is greatest in Ipswich but is also prominent in several other towns (e.g. Newmarket, Bury St Edmunds and Sudbury)
- Most employment associated with the manufacture of sporting goods is in Lowestoft which is home to Harrod Sport
- Businesses associated with renting or leasing of recreational and sporting goods has a dispersed spatial pattern, with many in rural areas as well as town centres.
- Ipswich is home to most businesses associated with fitness facilities.

Figure 3.7 Location of Sector Activity in Suffolk: Employment* (Top); Businesses^ (Bottom)

Source: BRES, 2017; Companies House, 2017
*Employment: size of bubble denotes absolute employment in each LSOA area and are centred in each boundary.
^Business: dots denote the registered location of businesses by postcode.
Infrastructure

There is much infrastructure supporting the Sport and Physical Activity sectors across Suffolk…

3.26 Research and consultation indicates that Suffolk boasts a broad range of infrastructure related to the Sport and Physical Activity sectors. Broad categories include:

- Leisure centres
- Private fitness centres
- Privately run sports clubs
- Professional sports clubs
- Alternative sporting facilities
- Natural assets
- Regular events
- Annual events

A database of the infrastructure identified has been provided to accompany this report.

Leisure centres and private fitness centres are well represented…

3.27 There are many leisure and private fitness centres across Suffolk.

3.28 Most of the leisure centres are either publicly owned and managed (e.g. by Ipswich Borough Council) or publicly owned and run by a leisure operator (e.g. Abbeycroft, Places for People or Sentinel Leisure). While the offering of each differs, they typically provide facilities including swimming pools, sports pitches, gyms and sports halls.

3.29 The leisure centres are complemented by several private fitness centres across the county – these provide services at either the higher or lower end of the market. Examples include Bannatyne Health Clubs in Bury St. Edmunds and Waveney, David Lloyd in Ipswich, Sports Direct Fitness in Bury St. Edmunds and Pure Gym in Ipswich. All of these include gyms, but operators at the higher end of the market tend to provide other activities/facilities for members (e.g. swimming, spa, tennis, badminton etc.).

3.30 As with the spatial patterns of businesses in the Sports and Physical Activity sectors (see Figure 3.7), many of these facilities are located in or close to major settlements. This is particularly the case for private fitness facilities which are primarily in Ipswich, Bury St Edmunds and Lowestoft. Publicly owned leisure centres are also close to larger settlements, but there are more of them and they are more widely spread across the county. This is important for accessibility and participation.

Suffolk has several alternative sporting facilities and important natural assets…

3.31 The county has a good mix of alternative sporting facilities appealing to a wide range of different interests. These include:

- Trampolining (e.g. Bounce Trampoline Centre, Ipswich)
- Skiing (e.g. Suffolk Ski Centre, Ipswich)
• Go Karting (e.g. Anglia Karting Centre, Ipswich)
• Yachting (e.g. River Orwell Yacht Club, Ipswich)
• Outdoor Activities (e.g. Wild Track Outdoor Activity Park, Newmarket)
• Shooting (e.g. High Lodge Leisure, Saxmundham)
• Water Sports (e.g. Alton Water Sports, Stutton)
• Hovercrafting (Flo-ridaz Hovercraft Experience, Stowmarket)
• Skydiving (e.g. UK Parachuting, Beccles)
• Paintballing (e.g. Skirmish Paintballing, Woodbridge)

3.32 While some of these facilities are close to major settlements, a number of them are in more rural areas due to the nature of the activity (e.g. Skirmish Paintballing, Woodbridge).

3.33 These are complemented by natural assets across the county which residents and visitors can use for a range of sporting, physical and leisure activities (e.g. walking, running, cycling, swimming and climbing). This includes local assets such as woods, forests, beaches, fields, lakes etc. and also a number of designated assets, including:

• Brandon County Park, Forest Heath
• Aspal Close Nature Reserve, Forest Heath
• Cavenham Heath National Nature Reserve, Forest Heath
• Rendlesham Forest, Suffolk Coastal District
• Benacre National Nature Reserve, Waveney

3.34 Consultations with stakeholders indicate that the county’s natural landscape is one of its most important assets and could be better utilised by residents to increase physical activity levels. The coastline was frequently discussed as an important strength of the region.

**Suffolk only has one major professional sports club**

3.35 The main professional sports club in the county is Ipswich Town Football Club. The team was founded in 1876 and moved into their current stadium, Portman Road, in 1884. The stadium has a capacity of over 30,000 and during the 2017/18 season the club attracted 18,000 spectators on average for each match. While it has not been formally assessed, evidence from other football clubs indicates that regular spectator attendance brings economic benefits to an area. Ipswich is also home to the Foxhall Stadium which hosts the Ipswich Witches Speedway Club.

**Suffolk has no large-scale sporting facility that can be used for different types of activities and events**

3.36 Despite having a range of facilities relating to sports and physical activity, consultation indicates that Suffolk lacks a large-scale sporting facility that can be used for both spectator events and physical activity.

3.37 This is reflected in the 2017 Suffolk Facilities Framework, which states that:

• Most local authorities in Suffolk face challenges from ageing leisure facility stock
• Ipswich, Babergh and Mid Suffolk identify the need for a sports hall that would fit eight badminton courts
• Provision of a 50m pool should be considered in Ipswich and the surrounding areas as a swimming pool of this size does not exist in the county

One option presented to deal with these concerns is to provide a large-scale facility (with a 50m swimming pool and large sports hall) that consolidates ageing facilities from several districts.

3.38 Consultation demonstrates that many stakeholders are in favour of a new large-scale sports facility and generally agreed that Ipswich would be a suitable place for one. Some discussed that the University of Suffolk currently lacks sporting facilities and that this presents an opportunity for collaboration. While some emphasised the merits of consolidating existing facilities to accommodate this, others were concerned that this could have a negative impact on participation.

Suffolk hosts regular and annual sporting events, but these are primarily related to running, cycling and swimming…

3.39 There are range of regular and annual sporting events across the county. The majority of these are focused on popular sporting activities like running, cycling and swimming.

3.40 Examples of regular events include:
• Parkrun (regular 5km running events in Brandon, Bury St Edmunds, Haverhill, Clare, Great Cornard, Ipswich, Kesgrave, Felixstowe and Lowestoft)
• Junior Parkrun (regular 2km running events for juniors in Bury St Edmunds, Great Cornard, Ipswich and Kesgrave)
• Great Run Local (regular 5km running events in Newmarket, Needham Market, Holbrook, Southwold)

3.41 Examples of annual events include:
• Great East Swim - annual swimming event in Alton Water with a range of distance options (250m, 1/2-mile, 1 mile, 2 miles, 5k and 10k)
• Ipswich Twilight Races – annual set of running races hosted over two days in Ipswich
• Women on Wheels – mass participation cycling event for women across the county (there are five different event types)
• Suffolk Trailfest Festival – festival of running across rural farmland between Bury St Edmunds and Sudbury
• Aldeburgh Fun Team Relay Triathlon – a team triathlon in Aldeburgh to support the RNLI and East Anglian Air Ambulance
• Heritage Coast Run and Walk – also known as the Saxmundham and Framlingham Rotary Marathon, this is an annual event for runners and walkers to enjoy the Suffolk coastline
• Alzheimer’s Society Memory Walk – annual walk of 2km or 6km in Christchurch Park, Ipswich focused on raising money for the Alzheimer’s society
• Great East Run – An annual half marathon in Ipswich
• Bungay Black Dog Festival of Running – An annual festival of running in Bungay involving a full marathon, half marathon and 10km event
• Eastern Counties Cup – Annual golf competition at the Woodbridge Golf Club open to members of affiliated clubs in Suffolk, Norfolk, Essex and Cambridgeshire (36 holes and handicap limit of 12)

• Race for Life – A range of events (5km run, 10km run, pretty muddy etc.) for women and children focused on raising money for Cancer Research – races held in Bury St Edmunds and Ipswich

• Suffolk Yacht Harbour Regatta – Annual sailing event at Suffolk Yacht Harbour

3.42 Consultation indicates that while these events primarily serve the local and regional population, the size and nature of some of them attracts participants from different parts of the country (e.g. Heritage Coast Run and Walk).

There are a range of other sporting events that Suffolk could host…

3.43 Even though Suffolk has a busy annual sporting calendar, there are a range of other events it could host to attract people to the area and stimulate the economic activity associated with this. Given the strength of the county’s natural assets, new events could take advantage and make better use of the county’s rural and coastal areas. Examples of events that could be introduced (either to increase provision or introduce new activity) are discussed later in the report (see table 4.1)

There are a range of useful case studies to demonstrate the breadth of infrastructure in Suffolk…

3.44 The examples set out below illustrate the breath of sporting infrastructure and activity that currently exists in Suffolk.

<table>
<thead>
<tr>
<th>Leisure Centre: Deben Pool</th>
</tr>
</thead>
<tbody>
<tr>
<td>Located in Woodbridge, Deben Pool is a local authority owned leisure centre that is run by leisure service provider Places for People. Facilities include a gym, pool, sauna and exercise studio. It has just received a major £3.4 million refurbishment and has recently re-opened. The hope is that this will attract more people to use it and influence participation levels in the area.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Professional Sports Club – Ipswich Town Football Club</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ipswich Town Football Club is the main professional sports club in the county. The football team are currently in the Championship and play at the Portman Road stadium in Ipswich, which has a capacity of 30,000 people. The club also has a women’s team and an academy. The academy currently has over 140 players in 10 Teams (from U9s to U23s), and all are based at the training ground on Playford Rd, Ipswich.</td>
</tr>
</tbody>
</table>
**Private Sports Club – Waveney Gymnastics Club**

Waveney gymnastics club is a world-class gymnastics centre located in Lowestoft. Supported by funding from the National Lottery and Waveney District Council, the centre opened in 2003 and is fully equipped with high-spec apparatus. The club currently has around 1,200 members from all over Suffolk and Norfolk.

The club was involved in the 2012 London Olympics, operating as an official pre-games training camp. It hosted international teams such as Canada and Australia.

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**Alternative Sporting Facility – Wild Tracks Outdoor Activity Park**

The Wild Tracks Outdoor Activity Park is an outdoor sports facility located just outside Newmarket. Located on a 60-acre site, it hosts a range of alternative sports activities such as Go Karting, Motocross, Battlefield Live and Archery. Their 1,500m sand Motocross track is recognised as one of the best in the UK. The park is suitable for children (aged 8 and above) and adults, and offers specialised children’s activities such as junior quad biking.

---

**Natural Assets for Sports Related Activities – Rendlesham Forest**

Rendlesham forest is a 1,500 hectare mixed woodland located near the village of Capel St Andrew near Woodbridge. The forest has recreation facilities for walkers, cyclists and campers and is commonly used by local people for off road cycling. There are a number of Forestry Commission guided walking and cycling trails of different lengths and difficulty levels. Events are also held in the forest, such as a Fungi exploring walk and animal watching tours.

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**Annual Events – Great East Swim**

The Great East Swim is an annual swim in open water. It is held at Alton Water just outside Ipswich, and offers a range of distance options: 250m, 1/2-mile, 1 mile, 2 miles, 5k and 10k. The event has been running for 10 years and is part of a wider series of open water swimming events held across the country.

The swim is open to all abilities and anyone aged 8 years or older, and last year over 1,500 people took part. Just over half of the 2017 participants were from outside of Suffolk, evidencing the reach of the event beyond the county.
Frequent Events – parkrun across the county

parkruns are free, weekly 5km runs which are open to everyone. There are around 12 parkruns across Suffolk, including runs in local parks and along the sea front. Races are held in Ipswich, Felixstowe, Bury St Edmunds and Lowestoft amongst others.

parkruns are organised nationally but are run by local volunteers. parkruns tend to have a significant number of participants; on the 9th June 2018, 415 people took part in the Ipswich event.

For those aged 4-14, parkrun also hosts a series of 2k Junior parkruns across the UK. In Suffolk there are 4 weekly Junior parkrun events around Ipswich, Bury St Edmunds and Sudbury.

Skills and Provision in the Sector

Suffolk has a broad range of skills which suit the diverse needs of the sector...

Suffolk has a more even split of skills compared to wider geographies. For example, a lower proportion of residents have a university level qualification (i.e. NVQ Level 4 or higher) compared to England, but a higher proportion have NVQ levels 3, 2 and 1 (i.e. GCSEs and A-Levels).

Figure 3.8 Education levels in Suffolk vs England, 2017

Source: Annual Population Survey, ONS, 2017
Transferable skills in the sector can provide a gateway into employment due to the range of occupations available…

3.46 Consultation suggests that Suffolk’s broad skill set is appropriate for the Sport and Physical Activity sector, as it comprises a range of roles that require different skill levels - from higher technical level roles to those that require lower skill sets.

3.47 A list of the most prominent occupations held in the sports and physical activity employment in the UK are identified in Table 3.4. The range of entry level positions available, progressing to skilled and administrative occupations to professional and technical occupations, demonstrates the sector’s potential to provide a gateway into high value employment.

<table>
<thead>
<tr>
<th>Entry Level Occupations</th>
<th>Skilled and Administrative Occupations</th>
<th>Professional and Technical Occupations</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Sports and leisure assistants</td>
<td>• Receptionists</td>
<td>• Leisure and sports managers</td>
</tr>
<tr>
<td>• Customer service occupations</td>
<td>• Book-keepers, payroll manages and wages clerks</td>
<td>• Teaching and educational professionals</td>
</tr>
<tr>
<td>• Sales and retail assistants</td>
<td>• Personal assistants and other secretaries</td>
<td>• Sports coaches, instructors and officials</td>
</tr>
<tr>
<td>• Leisure and travel service occupations</td>
<td>• Other administrative occupations</td>
<td>• Sports players</td>
</tr>
<tr>
<td>• Animal care services occupations</td>
<td>• Groundsmen and greenkeepers</td>
<td>• Sales accounts and business development managers</td>
</tr>
<tr>
<td>• Bar staff</td>
<td>• Catering and bar managers</td>
<td>• Vocational and industrial trainers and instructors</td>
</tr>
<tr>
<td>• Kitchen and catering assistants</td>
<td>• Chefs</td>
<td></td>
</tr>
</tbody>
</table>

Source: Census, 2011

Note: Data only available at UK level. Selection of largest occupations within sports and physical sector employment chosen for illustrative purposes.

There is a contrast in skill levels across the county, with lowest levels found in rural and inner-city areas…

3.48 Ipswich has the lowest proportion of residents with Level 4 qualifications and the second highest proportion with Level 1 qualifications or none at all. This reflects the characteristics of large cities which tend to have a greater mix of affluence and deprivation. Despite this, Ipswich has the largest proportion of employment in the Sport and Physical Activity in Suffolk which suggests that there may be employment opportunities in the sector that are accessible to those with lower level skills.

3.49 Each district has a reasonably large proportion of residents with either Level 1 qualifications or no qualifications (Waveney is the highest with 31%). As the Sport and Physical Activity sector supports a range of roles which require differing skills levels, it could be positioned as a sector to support residents with lower skills levels into employment.
There are a range of Sport and Physical Activity sector institutions and courses in Suffolk, but there remain specific skills gaps which need to be addressed...

3.50 Suffolk has a multitude of Higher and Further Education institutions which provide a range of qualifications, from degrees in Sports Science and Physiology to diplomas in Coaching and Training. There are also more specialised institutions providing training and skills education for activities like horseracing, football coaching and leisure operations. An illustrative list of institutions and courses offered is summarised in the table below.

3.51 Despite the range of qualifications and providers available, consultation indicates that a number of skills gaps exist that are specific to the Sports and Physical Activity sector in Suffolk. These include, but are not limited to, the following areas:

- **Leisure facility operation**: relevant skills needed for operating leisure centres and sports facilities are lacking, with further and higher education placing a greater focus on more technical sports science skills for the sector. Transferable “people” skills and business management skills have been identified as desirable for employers in the sector. In addition, specific high skilled jobs in managing facilities is lacking in some areas (e.g. a shortage of pool engineers).

- **Coaching and training**: while a range of qualifications are available for sports coaching, consultation indicates that there is a shortage of participation due to the perception of low pay and lack of clarity on career progression.

3.52 The future needs of the Sport and Physical Activity sector will be driven by factors such as growth in the use of data and technology (see the Future Drivers of Growth section towards the end of the Economic Opportunities chapter). As a result, there will be a number of skills needs and challenges for the sector around digital, tech, advanced manufacturing and food. The Sport and Physical Activity sector is currently well placed to support this, more technical skills to underpin this growth moving forward.

3.53 There are examples of institutions in Suffolk providing courses which respond directly to the skills gaps identified, included below.
<table>
<thead>
<tr>
<th>Institution</th>
<th>Courses Offered</th>
</tr>
</thead>
</table>
| University of Suffolk        | Degree (MSci and BSc Hons) Sport Coaching  
Degree (BSc Hons) Sport Psychology  
Degree (MSci and BSc Hons) Sport Performance Analysis  
Degree (BSc Hons) Sport and Exercise Science  
Degree (BSc Hons) Sport, Health and Exercise  
FdSc Sport, Health and Exercise  
FdSc Sports Coaching and Development |
| West Suffolk College         | L3 Diplomas in Sport and Sport & Exercise  
L3 Diploma in Working in Sport & Active Leisure  
Degree (BA Hons) in Applied Sport  
FdSc Sports Coaching and Development  
Apprenticeships in Leisure operations (in partnership with Abbeycroft Leisure)  
L2 Certificate in Health and Social Care  
L3 Diploma in Health and Social Care |
| Suffolk New College          | Diplomas in Health and Fitness instructing  
Diploma in Sport                                                                                                                                 |
| East Coast College           | Diploma and NVQ level qualifications in Sport, Exercise & Fitness, Public Service                                                                 |
| Suffolk ONE College          | Diploma in Football Coaching/Training  
Diploma in Sport & Exercise                                                                                                                   |
| AFC Sudbury Academy          | Higher National Diploma in Sports Coaching                                                                                                                                 |
| Lowestoft Town FC Football Education Programme | BTEC Level 3 Sport & Exercise Science  
BTEC Level 2 Sport  
FA Football Coaching Qualification                                                                                                                                 |
| Abbeycroft Leisure           | Swimming teaching  
Lifeguard training  
Fitness instructor training  
GP referral qualification                                                                                                                                 |
| British Racing School        | Level 3 Diploma in Administration and Organisation of Horseracing  
Level 2 Apprenticeships (incl. for a Jockey licence)  
Health and Safety Courses  
Ground Based Yard Staff Course  
Amateur Rider Permits  
Bookkeeping and Sage Accounts  
Foundation Degree (in partnership with Warwickshire College) |

Source: UNISTATS and Consultations

West Suffolk College

Alongside more traditional sports and physical activity courses, the college runs a diploma in *Working in Sport and Active Leisure* which aims to provide the skills, industry knowledge and practical experience for students to work in the leisure and tourism industry (such as adventure parks, beach resorts, leisure centres and heritage destinations). As part of the course Abbeycroft Leisure will host 10-15 student work placements for the first cohort of this year. Entry requirements are equivalent to 4 GCSEs or a Level 2 Diploma, which means it is accessible to those with Level 1 qualifications.
Lowestoft Town FC Football Education Programme
The Club offer a football development and education programme for students aged 16-19, linking practical skills of coaching and football to academic study. As part of the programme students can gain a Level 3 Sports and Exercise BTEC, Level 2 Sport BTEC and FA Football Coaching Qualification. The programme is designed to enable young people to pursue a career in football and coaching, gaining practical experience (including opportunities to play for the youth/reserve team) whilst achieving qualifications.

British Racing School
The British Racing School was established in 1983 to promote and encourage young people to ride as professional jockeys and has developed into a Centre of Excellence for training in the horseracing world. The school offers a range of skills and qualifications for horse racing and training, in addition to practical skills required to manage yard or stud farms relating to management, bookkeeping and secretarial work. The school also runs an apprenticeship programme in racehorse care open to beginning between the ages of 16 to 22.

Abbeycroft Leisure
The organisation has a structured approach to apprenticeships, aiming to convert apprenticeships into full time employment to fill specific skills gaps. The leisure centre work with West Suffolk College (referenced above) to identify common gaps in leisure recruitment and develop courses in response (such as “Working in Sport and Active Leisure Diploma above). The centre currently has 10 live apprenticeships covering areas such as fitness, facility management and finance.

Health

Participation in physical activity is in line with regional and national average but there is an opportunity to increase participation in the county...

3.54 Across Suffolk, 67% of people aged 19 or over regularly undertake the recommended level of physical activity (which is defined as 150 minutes or more of moderate intensity exercise per week). This is broadly in line with regional and national averages, however the proportion varies from 64% of adults in Ipswich to 74% of adults in Babergh.

3.55 While the majority of residents in all areas are ‘physically active’ around one fifth are classified as being physically inactive meaning that they undertake less than 30 minutes of moderate intensity exercise per week. This ranges from 25% in Waveney to 14% in Babergh. While Suffolk performs in line with comparator areas, there is an opportunity to increase participation in the county. When this is considered alongside the proportion of people not undertaking the recommended level of physical activity, it is clear that around one third of residents are not active enough to maintain healthy lifestyles according to guidelines from the Chief Medical Officer.

3.56 Physical inactivity causes a number of problems relating to health and workplace productivity. Research undertaken by Public Health England indicates that rising levels of physical inactivity coupled with an ageing population is increasing the prevalence of Musculoskeletal (MSK)
problems. The pain and disability caused by MSK was the second most common cause of sickness absence from work in 2016, with over 30.8 million working days lost. This effects workplace productivity and costs the UK £7bn a year. As mentioned in the Study Background, increasing levels of physical activity from a young age can reduce the risk of problems such as these.

Figure 3.10 Physical Activity of Residents Aged 19 and Over in Suffolk

<table>
<thead>
<tr>
<th>Area</th>
<th>Physically Active</th>
<th>Other</th>
<th>Physically Inactive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ipswich</td>
<td>64%</td>
<td>18%</td>
<td>19%</td>
</tr>
<tr>
<td>Waveney</td>
<td>65%</td>
<td>10%</td>
<td>25%</td>
</tr>
<tr>
<td>Mid Suffolk</td>
<td>66%</td>
<td>13%</td>
<td>21%</td>
</tr>
<tr>
<td>England</td>
<td>66%</td>
<td>12%</td>
<td>22%</td>
</tr>
<tr>
<td>Forest Heath</td>
<td>66%</td>
<td>13%</td>
<td>21%</td>
</tr>
<tr>
<td>East of England</td>
<td>67%</td>
<td>12%</td>
<td>22%</td>
</tr>
<tr>
<td>Suffolk Coastal</td>
<td>67%</td>
<td>11%</td>
<td>23%</td>
</tr>
<tr>
<td>Suffolk</td>
<td>67%</td>
<td>12%</td>
<td>21%</td>
</tr>
<tr>
<td>St. Edmunds</td>
<td>71%</td>
<td>8%</td>
<td>22%</td>
</tr>
<tr>
<td>Babergh</td>
<td>74%</td>
<td>12%</td>
<td>14%</td>
</tr>
</tbody>
</table>

Source: Public Health England (based on Active Lives, Sport England), 2016/17

Figure 3.11 Resident Age Profile (2016)

Source: Mid-Year Population Estimates (ONS), 2016
Suffolk has an older resident age profile than England or the East of England, where 23% of the population are aged 65 or older. However, there is no clear relationship between the resident age profile and levels of physical activity. For example, while Waveney has an older population age profile and lower rates of physical activity, Babergh has the highest rate of physical activity and a similar age profile. In addition, Ipswich has one of the lowest rates of physical activity as well as the youngest age profile in Suffolk. These figures suggest that, while age is likely to be a factor influencing physical activity, other factors are driving the variation between areas. There appears to be some correlation between low physical activity and deprivation when compared against the 2015 Index of Multiple Deprivation from the Ministry of Housing, Communities and Local Government.

The figures below demonstrate that, across a range of activities, participation in Suffolk is a mid-level performer. Suffolk performs broadly in line with the regional average in relation to the proportion of residents that walk at least five times a week, cycle regularly or utilise outdoor space for health/fitness purposes. However, in each case there are parts of the East of England where participation is higher, suggesting that there is an opportunity for participation in Suffolk to increase, particularly in parts of the county that are currently underperforming.

**Figure 3.12 Proportion of Adults that Walk At Least Five Times a Week**

Source: Department for Transport; Active People Survey, Sport England (2014/15)

Definition: Number of respondents aged 16 and over who did at least 10 minutes walking on twenty or more in the 28 day survey period
Figure 3.13 Proportion of Adults that Cycle

Source: Department for Transport; Active People Survey, Sport England (2014/15)
Defined as 'any cycling'

Figure 3.14 Utilisation of Open Space for Health / Exercise Reasons

Source: Natural England: Monitor of Engagement with the Natural Environment (MENE) survey (2015/16)
Visits to the natural environment are defined as time spent "out of doors" e.g. in open spaces in and around towns and cities, including parks, canals and nature areas; the coast and beaches; and the countryside including farmland, woodland, hills and rivers. This does not include routine shopping trips or time spent in own garden.
Obesity levels and health outcomes are also broadly in line with the regional and national average.

3.59 The patterns identified above are reflected in rates of obesity and excess weight in the county - Suffolk performs broadly in line with the regional and national average. Obesity and excess weight levels are below the poorest performing authority in the region, but there is scope for improvement. For instance, 22% of residents are overweight compared to 19% in Cambridge and 62% have excess weight compared to 59% in Southend.

3.60 It is also important to note that excess weight is prevalent – 61% of people were carrying excess weight in 2016/17 across England. This suggests that there is scope for significant improvement across all parts of the country, including Suffolk.

3.61 In addition, Suffolk has the highest proportion of days lost to sickness in the East of England. While overall proportions are low, the proportion of employees who had at least one day off in the week prior to participating in the Labour Force Survey (2.9%) is 50% higher than the national average. Overall, 1.8% of working days were lost to sickness in Suffolk which is 64% higher than the national average.

3.62 Based on the level of employment in Suffolk, this suggests that around 1.3 million working days may be lost to sickness each year – which is 430,000 above the level it would be if the rate was in line with the national average.

**Figure 3.15 Prevalence of Obesity and Excess Weight**


---

7 Based on total employment of 353,000 and the estimated split of part-time and full-time employees (Annual Population Survey, 2016), and an assumption that employees work for 48 weeks of the year.
Figure 3.16 Sickness Absences

- Suffolk
- Norfolk
- Bedford
- Peterborough
- Luton
- England
- Thurrock
- East of England region
- Essex
- Central Bedfordshire
- Cambridgeshire
- Hertfordshire
- Southend-on-Sea

<table>
<thead>
<tr>
<th>%</th>
<th>Suffolk</th>
<th>Norfolk</th>
<th>Bedford</th>
<th>Peterborough</th>
<th>Luton</th>
<th>England</th>
<th>Thurrock</th>
<th>East of England region</th>
<th>Essex</th>
<th>Central Bedfordshire</th>
<th>Cambridgeshire</th>
<th>Hertfordshire</th>
<th>Southend-on-Sea</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.0%</td>
<td>0.5%</td>
<td>1.0%</td>
<td>1.5%</td>
<td>2.0%</td>
<td>2.5%</td>
<td>3.0%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Black bar: Percentage of employees who had at least one day off in the previous week.
- Light blue bar: Percentage of working days lost due to sickness absence.

Source: Labour Force Survey (2014-16)
4. Economic Opportunities

Improving Participation and Boosting Productivity

**Figure 4.1 Headline Statistics**

- **Proportion of days lost to sickness in Suffolk is 50% above the national average**
- **£424 million a year in lost economic activity due to sickness in Suffolk**
- **10% reduction in sickness rates = extra £42 million GVA to Suffolk economy per year**

**ADDITIONAL BENEFITS OF INCREASED PARTICIPATION**

- **Reduction in GP visits = cost savings to NHS of £13.25 pp per year**
- **Reduction in anxiety and long-term benefits to mental health**
- **Other social benefits: reduced crime and increased social cohesion**

4.1 1.8% of working days in Suffolk were lost to sickness between 2014-16, which is equivalent to 1.3 million days per annum. The proportion of days lost to sickness in Suffolk is 50% above the national average and bringing sickness rates in Suffolk in line with the national average would reduce the total number of days lost of sickness by 430,000 per annum. Clearly this represents a significant loss of economic activity for the county\(^8\) and the scale of the potential impact is set out below.

4.2 The average Gross Value Added (GVA) of a Full-Time Equivalent employee (FTE) across Suffolk was £67,000 in 2015. This suggests that the total cost of working days lost to sickness in Suffolk is £424 million a year in lost economic activity.

4.3 If it were possible to reduce the rate of days lost to sickness in line with the national average, the cost to the Suffolk economy would reduce to £283 million – resulting in an additional £141 million of economic activity in the Suffolk economy.

4.4 However, there may be a number of factors behind the variation in rates of sickness, including relative population age profiles and the nature of work undertaken – Suffolk has an older age profile than England and is more dependent on agricultural and manual employment where rates of sickness due to injury may be higher than service and office-based sectors. While it may not be possible to reduce rates of sickness to the national level, it is important to note that every 10% reduction in sickness rates would generate an additional £42 million in GVA to the Suffolk economy per year.

4.5 There are a number of examples across the country of workplace-led initiatives to improve health and levels of physical activity amongst staff and, as a result, decrease the number of days lost to sickness.

\(^8\) It is also important to note that the negative impacts of sickness days are not uniform and will vary by business and employer. For example, smaller employers will experience greater negative effects as a result of days lost due to sickness.
lost to sickness. Initiatives for individual companies can range from small changes such as providing free fruit to larger interventions such as support to quit smoking or building an on-site gym.

4.6 As shown in the box below, there is also a role for larger public sector organisations in encouraging healthier workplaces.

**Healthy Workplace Charter, Mayor of London**

The London Healthy Workplace Charter provides clear and easy steps for employers to make their workplaces healthier and happier. Anyone from small businesses to large corporations to public sector organisations can sign the charter and commit to making positive changes in their workplace. For example, Lloyds of London achieved their Charter accreditation by introducing health and wellbeing training for managers, promoting flexible working arrangements and hosting events to promote healthy eating.

### Additional benefits

4.7 The impacts of increased participation can also be evidenced across the broader population as a whole. Research at the national level has found a number of additional benefits to both the economy and society as a result of increased participation in sports and physical activity:

- Research by Sport England shows that NHS providers spent over £900m in 2009-2010 treating people with diseases that could be prevented through greater physical activity. In 2015, DCMS found that a **reduction in GP visits** as a result of improved health due to sports participation led to **costs savings for the NHS of £13.25 (all sports), £7.14 (team sports) and £12.12 (individual sports), per person per annum.**

- Sports participation also leads to a **reduction in anxiety** and to **long-term benefits in psychological health.** DCMS found that sports participants were less likely to report clinical depression than non-participants, which results in an improvement in the individual’s Quality Adjusted Life Years with a total value of about £1.16bn per annum (£40 per annum per person). In addition, **reduction in the use of mental health services leads to a cost saving for the NHS of £17.86 per person per annum.**

- Further research led by DCMS found that **underachieving young people who take part in sport see a 29% increase in numeracy skills and a 12-16% rise in other transferable skills.**

- Other social and community benefits include **reduced crime,** as seen through the Kickz football programme in North London. Youth crime has dropped significantly in the area, 20% of which is attributable to Kickz. This gave a social ROI of £7.35 for every £1 invested.

### Sporting Events

4.8 Even though Suffolk has a busy annual sporting calendar, there are a range of other events it could host to attract people to different parts of the county and stimulate the economic activity associated with this. The positive economic impacts of sporting events occur due to spending from participants, spectators and organisers (Figure 4.2).
4.1 Table 4.1 provides an overview of events that could be introduced to help stimulate economic activity in Suffolk. While some may already occur (e.g. sailing and triathlon), they have not been excluded because of one or more of the following reasons:

- There are few similar events
- Existing events have a relatively small profile
- Events are clustered in one part of the county

4.2 Three of these options will be discussed in further detail: major triathlon, accessible events and a beach sports event. These have been chosen due to their ability to make a meaningful economic and social impact.

4.3 While there may be opportunities to bring nationally or internationally significant events to the region (e.g. Tour de France or Commonwealth Games), these would be difficult to attract due to a lack of large-scale sporting facilities in the area and the high costs involved. The focus of this work has been on more realistic, achievable and lower-cost opportunities.
Table 4.1 Examples of Sporting Events that could be Introduced

<table>
<thead>
<tr>
<th>Category</th>
<th>Event Type</th>
<th>Possible Location</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Water Events</td>
<td>Water skiing</td>
<td>North east coast</td>
<td>Tor Bay Water Skiing Event</td>
</tr>
<tr>
<td></td>
<td>Sailing</td>
<td>North east coast</td>
<td>Poole Regatta</td>
</tr>
<tr>
<td></td>
<td>Combined Event</td>
<td>North east coast</td>
<td>Polkerris Big HiSive</td>
</tr>
<tr>
<td>Specialist Events</td>
<td>Major Triathlon</td>
<td>North east coast</td>
<td>Iron Man Weymouth</td>
</tr>
<tr>
<td></td>
<td>Tough Mudder</td>
<td>Around Lowestoft</td>
<td>Tough Mudder Skipton</td>
</tr>
<tr>
<td></td>
<td>Pentathlon</td>
<td>North east coast</td>
<td>British Modern Pentathlon Championships, Bath</td>
</tr>
<tr>
<td></td>
<td>Closed Road Cycling</td>
<td>Around Ipswich</td>
<td>Tour of Cambridall</td>
</tr>
<tr>
<td></td>
<td>Scheme</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Parkour</td>
<td>Around Ipswich</td>
<td>North American Parkour Championship</td>
</tr>
<tr>
<td></td>
<td>Corporate Games</td>
<td>Major town/s</td>
<td>Stoke on Trent Corporate Games</td>
</tr>
<tr>
<td></td>
<td>Firefighter Games</td>
<td>Major town/s</td>
<td>World Firefighter Games</td>
</tr>
<tr>
<td>Special Focus</td>
<td>Sea Swimming</td>
<td>North east coast</td>
<td>Island to Island Swim, Isle of Arran</td>
</tr>
<tr>
<td>Swimming / Running Events</td>
<td>Fully Accessible</td>
<td>Large accessible town</td>
<td>Parallel Run, London and Glasgow</td>
</tr>
<tr>
<td></td>
<td>Running</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Fully Accessible</td>
<td>Alton Water or</td>
<td>Down Syndrome International Swimming</td>
</tr>
<tr>
<td></td>
<td>Swimming</td>
<td>suitable leisure centre</td>
<td>Organisation</td>
</tr>
<tr>
<td>Ipswich Town Football Club</td>
<td>Stadium Hire</td>
<td>Ipswich</td>
<td>American Football at Wembley and Winter</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Playground in Cleveland</td>
</tr>
<tr>
<td></td>
<td>Pre-season tournament</td>
<td>Ipswich</td>
<td>South Shields Pre-Season Tournament (inc.</td>
</tr>
<tr>
<td></td>
<td>(inc. teams from other</td>
<td></td>
<td>Marseille, Celtic and Southampton)</td>
</tr>
<tr>
<td></td>
<td>parts of the world)</td>
<td></td>
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</tbody>
</table>

A major triathlon event could be introduced to the county...

4.4 Suffolk currently hosts several triathlons each year (e.g. Alton Water Triathlon, West Suffolk Triathlon and Aldeburgh Fun Team Relay Triathlon). These are, however, relatively local and primarily attract participants from the county and region.

4.5 There is an opportunity to attract a larger and more prominent event to the area, such as an Ironman\(^9\). These are long-distance multi-sport endurance events that occur worldwide and attract people from across the globe to participate (Table 4.2).

4.6 While there are a range of Ironman events (Table 4.3), the most popular are the full and half (Ironman 70.3) triathlons. This is illustrated by the number of athletes that participate in the events:

- Bolton 2017: 2,040 athletes (Ironman triathlon)
- Pembrokeshire 2017: 2,066 athletes (Ironman triathlon)
- Staffordshire 2017: 2,102 athletes (Ironman 70.3)
- Edinburgh 2017: 1,573 athletes (Ironman 70.3)
- Weymouth 2017: 2,408 athletes (Ironman 70.3)

\(^9\) Other triathlon providers that could be engaged include GoTri (British Triathlon) and Live To Tri.
Table 4.2 Ironman Triathlons 10 June 2018-23rd June 2019

<table>
<thead>
<tr>
<th>Americas</th>
<th>Boulder, USA; Lake Placid, USA; Whistler, Canada; Mon-Tremblant, Canada; Wisconsin, USA; Maryland, USA; Chattanooga, USA; World Championships, Hawaii; Louisville, USA, Florida, USA; Cozumel, Mexico; Arizona, USA; Ironman South American Championship, Argentina; Ironman North American Championship, Texas, USA; Santa Rosa, USA; Florianopolis, Brazil.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>Nice, France; Haugesund, Norway; Klagenfurt, Austria; European Championship, Frankfurt; Bolton, UK; Hamburg, Germany; Tallinn, Estonia; Limburg, Netherlands; Kalmar, Sweden; Copenhagen, Denmark; Vichy, France; Pembrokeshire, Wales; Emilia-Romagna, Italy; Barcelona, Spain; Lanzarote, Canary Islands; Cork, Ireland.</td>
</tr>
<tr>
<td>Asia</td>
<td>Subic Bay, Philippines; Gurye, Korea; Penghu, Taiwan; Langwaki, Malaysia.</td>
</tr>
<tr>
<td>Africa</td>
<td>Ironman African Championship, South Africa.</td>
</tr>
<tr>
<td>Australasia</td>
<td>Busselton, Western Australia; Ironman Asia-Pacific Championship, Australia; Taupo, New Zealand.</td>
</tr>
</tbody>
</table>

Table 4.3 UK Ironman Events June 10th 2018 – June 23rd 2019

<table>
<thead>
<tr>
<th>Ironman Triathlon</th>
<th>2.4 mile swim, 112 mile bike ride, 26.22 mile marathon</th>
<th>Bolton; Pembrokeshire</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ironman 70.3</td>
<td>1.2 mile swim, 56 mile bike ride and 13.1 mile run (half ironman)</td>
<td>Edinburgh; Staffordshire; Weymouth.</td>
</tr>
<tr>
<td>Short Course Tri</td>
<td>Shorter triathlon events branded and run by Ironman</td>
<td>N/A</td>
</tr>
<tr>
<td>Running</td>
<td>Running events branded and run by Ironman</td>
<td>N/A</td>
</tr>
<tr>
<td>Cycling</td>
<td>Cycling events branded and run by Ironman</td>
<td>Cardiff</td>
</tr>
<tr>
<td>Ironkids</td>
<td>Triathlon events for children branded and run by Ironman</td>
<td>Staffordshire; Bolton; Edinburgh; Pembrokeshire; Exmoor</td>
</tr>
</tbody>
</table>

4.7 Participants come from across the country and around the world to compete in Ironman events which generates spend and economic activity in an area. Research from the University of Tennessee\(^\text{10}\) shows that the 2014 Ironman in Chattanooga had a number of positive economic impacts for the local economy as shown in the box below.

**Reported Economic Impact of 2014 Tennessee Ironman**

- 21,780 spectators, including a minimum of 10,270 out of town visitors
- 2612 athletes participated, with 18% from Tennessee
- Athletes made an average of 1.3 trips to Chattanooga prior to the race for training
- Athletes spent $1598 on average and visitors spent $1137 on average while in the area
- Participants spent 3.7 nights and visitors 3.3 nights on average in the area
- Participants generated an estimated $2.4m and visitors an estimated $7.9m of spend for a total gross direct impact of $10.3m to the local economy

4.8 The natural assets of Suffolk’s coastal and rural areas make it well suited to host an Ironman event. Research suggests that there are currently no Ironman events in the East or South East of England, which provides a strong rationale to pursue it as an option.

4.9 Unlike smaller events (e.g. Tough Mudders and Colour Runs) the relatively poor public transport connections to London from Suffolk’s coastal and rural areas should not be a problem due to the size/nature of the events and the characteristics of the participants/visitors. Research indicates that there are more Ironman 70.3 events and that these may be easier to organise than

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\(^{10}\) Ironman 2014 Impact Report, Dr Andrew Bailey, University of Tennessee
traditional Ironman triathlons. They may also encourage participation from a wider group of people.

4.10 Similarly to the example from Tennessee, an economic impact assessment of the 2016 Weymouth Ironman illustrates significant economic benefits for the host area as outlined in the box below.

**Weymouth Ironman 70.3**\(^{11}\)

The Weymouth Ironman 70.3 has been taking place since 2014. It is a popular course and in 2016 it won the 2016 Ironman Athletes Choice awards for overall swim. The course involves:

- 1.2 mile swim in Weymouth Bay
- 56 mile anti-clockwise cycle through the Dorset countryside (via Puddletown, Cerne Abbas and Dorchester)
- 13.1 mile run from Lodmoor County Park along Weymouth esplanade

According to survey results from Dorset County Council\(^{12}\) the event had a number of positive economic impacts for the area:

- Around 3,000 entrants came, with approximately 10% from Dorset
- Aggregated spend of entrants during training visits and for the event itself generated a total reported Gross Value Added of £1.2 million to the Dorset economy after deductions for taxes and retail margins
- Spend of approximately £92,500 by organisers with local suppliers added a further £71,000 in GVA to the economy after deductions for taxes and retail margins
- Taking into account losses associated with traffic build-up it is estimated that it reported that it had a net benefit to the Dorset economy of £1.1m, with about 84% of the benefit in Weymouth itself (circa £953k)

There is an opportunity to host events that are accessible to all…

4.11 Suffolk’s sporting calendar is dominated by running, cycling and swimming events, but research illustrates that few if any are accessible to all. This is generally the case across the country, despite it being relatively simple to make some events accessible as the running-focused case study of Parallel London below demonstrates.

4.12 There is therefore an opportunity for Suffolk to host a relatively large accessible event. Owing to its central position in the East of England it would be ideally placed to be the main event of this nature for the wider region.

4.13 There are a number of options to make this happen, including:

- The creation of a new event based on the principles of Parallel London but adapted/changed to attract more participants
- Inviting and supporting Parallel London to host an annual event in Suffolk

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\(^{11}\) Source: Dorset County Council, Dorset Echo and Ironman Website

\(^{12}\) Ironman Weymouth Economic Impact Assessment, Dorset County Council, November 2016
• Adapting an existing event (e.g. Ipswich Twilight Races) to include events to cater for all and attract a greater number of participants

4.14 Given the need for hard surfaces (in the case of running) and accessible transportation, one of the county’s major towns would be most suitable for an event of this type. Ipswich is a clear candidate given its size and accessibility to other parts of region. For example, Trinity Park (the county showground) or Bentwaters Park airfield could be appropriate sites due to their accessibility and hard surfaces.

4.15 While no economic impact assessments for fully accessible events could be found, Parallel London demonstrates that large numbers of participants can be attracted to an event which would have a positive impact on local spend. Even though it is a different event, and likely to be larger than an accessible event in Suffolk, the economic impact assessment of the Great South Run provided by Bluegrass Research demonstrates the impact that running events can have (see box below).

Parallel London Case Study

Parallel London is the world’s first fully inclusive fun run and is based at London’s Queen Elizabeth Olympic Park. According to the organisation’s website:

“Parallel is designed for all abilities and ages. There’s no cut off times and everybody can run together, side by side. Everybody will be given time to finish the race. We will provide free chip timers so you can record your time and aim to beat it next year. All participants who need a helping hand are invited to bring a friend of family member to accompany, guide or push them free of charge. We welcome all kinds of mobility aids on the course”.

There are five main races: 100m, 1km, 5km, 10km and 1km sensory run.

One of the most popular events is the 1km sensory run, which involves a track with bubbles, music, light tunnels, parachutes and ribbon canopies. This appeals to any participants whose memories are aided by sensory support.

Organisers report that there were over 2,000 participants at the 2016 event, with around 500 carers in support.

The event has gone from strength to strength and has recently expanded to Glasgow, which is the second host city. The event recently won the 2017 Sports Business Award for Best Mass Participation Event.

13 Source: Parallel London website
Suffolk could make better use of its coastal assets by holding a large-scale beach sports event…

4.16 Suffolk’s coastline is a significant natural asset for the sports and physical activity sector. Research shows there is much local sporting activity that takes place along the coast, such as small beach sports tournaments and coastal runs, but there are few events which are large-scale and have reach beyond the local population. Instead, there is an opportunity for a coastal event which showcases the full potential of Suffolk’s coast line.

4.17 The coastline in Suffolk can host a range of sports including beach volleyball, swimming and regattas, for example. One way to expand the scale of these activities and to maximise the use of the coastline would be to offer a multi-sport event which includes different types of beach sports.

4.18 There is currently a beach volleyball tournament held in Lowestoft, which could be expanded to include other sports such as beach football, rounders, rugby etc. Lowestoft would be well placed to host such an event as it already has a strong regional and national reputation for its beautiful beaches and for being an events location that is popular with young people.

4.19 In addition, existing coastal events in the area could be built upon to create an annual coastal sports festival which incorporates beach sports and other coastal events such as swimming, wakeboarding, sailing etc.

4.20 The Cornwall Beach Games\(^1\) (see case study box below) demonstrates what a multi-sport beach sports event like this could look like. Although economic impact assessments do not exist for this type of activity, the economic impact assessment of the Great East Swim demonstrates the impact that swimming already has in the county and how events which attract visitors from outside of the area can make a significant economic contribution to the local economy (see example on the next page). The Great East Swim is now in its 10\(^{th}\) year in Suffolk.

\(^{14}\) Source: Most Active County Events Programme 2017

\(^{15}\) Another beach sports provider is Yellowave Beach Sports who put on beach sports tournaments in Brighton.
2018 Cornwall Beach Games

The Cornwall Beach Games is an annual barefoot event on Perranporth beach. Now in its eighth year, the event sees people from all across Cornwall come to compete in a series of beach events. Beach games include:

- Rounders
- Netball
- Volleyball
- Team building
- Tug of War

The event is co-organised by Cornwall Sports Partnership and Cornwall Health Promotion Service’s Healthy Workplace Programme. As a result, the event mainly targets Cornish companies and encourages businesses to enter teams. Sign up costs £100 per team of 8-12 people.

Great East Swim 2017 - Economic Impact Assessment\(^{16}\)

- Over 1,500 swimmers across the different races - 58% of swimmers were non-residents of Suffolk, each with an average spend of £98 during their visit. This compares to an average spend of £41 per resident participant.
- 20% of swimmers stayed overnight and 91% of non-residents were encouraged to visit Suffolk again as a result of the event.
- Direct net economic impact of £740,000 (including multipliers):
  - Swimmers: £113,000
  - Spectators: £200,000
  - Event Organisers: £56,000
  - Charities and Sponsors: £2,000
- Over £160,000 was raised for charity as a result of the swim.

\(^{16}\) Bluegrass Report, July 2017
This section outlines the potential economic benefits which could be realised by the delivery of a new major venue in Suffolk.

Proposals for a new sports venue are based on recommendations in the Suffolk Sports Facility Framework (2017), which identifies a number of infrastructure opportunities in the county. One such opportunity is to deliver a new sports venue with 8-12 badminton courts (also serving as an events venue for indoor sport) and a 50m swimming pool. We have used this as an example for an opportunity in the sector.

In line with recommendations and Sports England guidance, the economic benefits in this section are based on a new sports venue with the following specification:

- 50m community pool and 8 lane plus learner pool
- 8 court sports hall
- 150 station health and fitness gym
- 3 health and fitness studios

The following benefits are high level estimates and will be subject to change as the details of a scheme develop.

The specific economic benefits covered are:

- Operational employment benefits
- Visitor expenditure benefits
- Construction employment during the delivery stage
- Financial benefits
4.26 In addition, the creation of a new venue would make hosting more frequent and larger events easier and more attractive. This would unlock the economic impacts associated with large events.

The new venue will support direct and indirect employment, delivering economic output for Suffolk’s economy…

4.27 According to Sports England Guidance\(^{17}\) a new sports venue with the specification proposed will be around 7,400 sqm (Gross Internal Floor Area) in size.

4.28 Total gross employment that could be supported has been calculated using Homes and Community Agency (HCA) employment density guidance\(^{18}\) and is based on the floorspace above. It is estimated that the proposed sports venue could support in the region of **100 gross direct FTEs**.

4.29 Total GVA output based on gross direct jobs has been calculated using UK averages in the Annual Business Survey\(^{19}\). It is estimated that the proposed sports venue could support a **gross direct GVA output of £3.5 million per annum**. Using a standard discount rate\(^{20}\), this could generate a **present value gross direct GVA output of £30 million over 10 years**.

4.30 Economic multiplier effects based on government guidance also provide the number of gross indirect FTEs supported through further economic activity (such as supply chains). It is estimated that the proposed sports venue could support in the region of **10 gross indirect FTEs** through supply chains.

4.31 Total GVA output based on gross indirect jobs has been calculated using UK averages in the Annual Business Survey\(^{21}\). We estimate that the proposed sports venue could support a **gross indirect GVA output of £0.35 million per annum**. Using a standard discount rate, this could generate **present value gross direct GVA output of £3 million over 10 years**.

**Construction of a new sports venue can provide opportunities for employment, training and apprenticeships…**

4.32 According to Sports England Guidance\(^{22}\) a new sports venue with the specification proposed could cost around £18 million to build.

4.33 HCA guidance has been used which applies labour coefficients to measure the number of workers supported per £1 million construction investment. Due to the varied nature of construction projects the construction jobs will not necessarily be FTEs. Based on this assumption the proposed new sports venue could support in the region of **140 workers per year over a 2-year build period**.

4.34 Moving beyond economic outcomes, the construction phase has potential to maximise social benefits to the local area, through local supply chains, delivering training, apprenticeships and

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17 Sports England, Facility Costs Second Quarter 2017
19 ONS, Annual Business Survey, 2016
20 This is 3.5% in line with guidance from the Treasury’s Green Book
21 ONS, Annual Business Survey, 2016
22 Sports England, Facility Costs Second Quarter 2017
local job opportunities. These should be key considerations when developing the construction and procurement strategy.

**There is currently demand for sports halls and swimming not being met, and an opportunity for new users to spend money locally...**

4.35 Users of the new sports centre may spend money in the local area as part of their visit. Visitor spend on retail, food and beverage businesses in the local area can increase business turnover and support employment and GVA.

4.36 The Sport England Facilities Planning Model (FPM) assesses the number of visits demanded in peak periods for sports halls and swimming pools and the number of visits not being met by current capacity in Suffolk County. According to the model, there are around 4,400 sports hall visits per week in the peak period and around 5,700 swimming pool visits per week in the peak period not being met by current capacity in Suffolk, accounting for **525,000 visits per year**.

4.37 Unmet demand is spread thinly across the county and much of it is from people without access to a car living outside a 20-minute walking catchment. No single location meets all unmet demand, though an urban area facility is best placed to meet more unmet demand for people without access to a car. Town centre locations are also likely to generate greater expenditure given the proximity to shops, although out of town locations may be more appropriate for availability of space and parking.

4.38 Ipswich has been used as a location to demonstrate the potential visitor expenditure impact of a new venue on a town centre, given its transport accessibility and large catchment area. The visitor expenditure impact for an out of town centre location has not been tested due to a lack of evidence available.

4.39 The Sports England FPM model estimates a combined total of **52,000 visits to swimming pools and sports halls not being met by current capacity in Ipswich**. Actual usage of a new venue will likely be higher, considering transfer of demand from other centres, closure or consolidation of facilities, and visitors travelling from outside the defined catchment area (15-minute drive or 20-minute walk).

4.40 Based on an average spend per visit of £12 provided by The Great British High Street, and using a conservative assumption that 1 in 10 users will spend money in the town centre as part of their visit, the unmet demand could generate a gross spend in the town centre of around **£62,500 per year**. Using a standard discount rate, this could generate around **£550,000 in gross spend for the town centre over 10 years**.

4.41 Visitor spend can generate additional turnover for town centre businesses. Assuming users spend money on retail, food and beverage uses, and using average turnover figures per FTE job from the Annual Business Survey, increased business turnover can support an additional 4 FTEs. This employment can generate an additional **£0.12 million gross GVA per annum**, and over 10 years this could generate a present value gross GVA output of **£1 million** after discounting is applied.

4.42 Given the availability of land in most cities, however, many sports venues are being built in out of town areas which would have fewer economic benefits for local shops and businesses.

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23 Based on average spend figure of a town centre visitor when combining shopping with a non-shopping town centre visit. Based on study published by The Great British High Street, The Customer Experience of Town Centres, 2014
Increasing participation and the attractiveness of the area…

4.43 The delivery of a new venue can contribute to targets to increase levels of participation in the county as new infrastructure can help boost activity. Projections for a new venue with an 8-lane pool and 120 station gym in East Cambridgeshire suggest that participation levels could double.

4.44 During the consultation process, the University of Suffolk also raised that the lack of sporting facilities in Ipswich is a barrier when trying to attract students from outside the area - currently, the University is made up of around 80% local students. A major new sports venue could help to attract new students and increase the proportion of students from elsewhere in the country. This would have a number of associated economic impacts as a result of the increased spend in the area brought by more students. According to the Student Money Survey 2018, each student spends on average £358 per month – when this is scaled up to a whole year and hundreds of students the economic implications could be significant.

The council can generate additional income through business rates generation…

4.45 The proposed commercial space for the new sports venue can provide income for the council through business rates generation. Based on the average rateable values for leisure uses in Ipswich, it is estimated the proposed sports venue can support an annual income of £0.26m per annum. Using a standard discount rate, this could generate a present value income of £4.5 million over 10 years.

Future Drivers of Growth

4.46 Physical inactivity and obesity are widely recognised as global societal issues. Global life expectancy is increasing alongside this and many populations are ageing.

4.47 These trends, alongside factors like rising disposable incomes and increasing interest in sports, health and wellbeing, are contributing to significant growth in the Sport and Physical Activity sectors at global and national scales.

According to Deloitte’s 2018 European Health and Fitness Market report:

- The European health and fitness market grew by 1.9% to EUR 26.6 billion in terms of revenue in 2017
- There was been a 3.2% rise in health and fitness clubs across all countries in Europe between 2016 and 2017, which led to a 4% rise in membership
- There were 20 major merger and acquisition transactions in the health and fitness market in 2017, which represents the highest number recorded over the past five years
- The two largest markets in Europe in 2017 were the UK and Germany, with 39% of the continent’s market between them

4.48 Similar trends are reported at the global scale and for the Sport and Physical Activity sectors more broadly.

4.49 This growth, which is forecast to continue, presents a number of opportunities for development and innovation in the Sport and Physical Activity sectors. The rest of this section provides an overview of these opportunities and considers their relevance to Suffolk.

24 The Health and Fitness market is a constituent part of the Sport and Physical Activity sectors
Data is becoming a bigger part of the Sport and Physical Activity sectors…

4.50 Businesses are increasingly using data driven solutions to stay competitive and understand their customers better. Digital technology allows organisations to access more data than ever before and better design products and services. Such insight has historically been underutilised in the Sport and Physical Activity sectors, but this has started to change in recent years.

4.51 One of the most significant areas of development has been around wearable devices. These have penetrated the consumer sports equipment market and are now being used in major professional sports. Not only do they provide useful data about individuals to businesses for product marketing and design, they also allow consumers to access biomedical data about themselves and their physical/sporting performance.

- **Wearable devices** are used to track users’ vital signs or pieces of data related to health and fitness, location or biofeedback. Wearable device models may rely on wireless systems such as Bluetooth, 3G, GPS or local Wi-Fi setups. Examples include the Apple Watch and Fitbits.

4.52 The main opportunity with these devices is developing them so they can be used more effectively in professional sport to track and improve performance.

4.53 Where data is made available it could also have applications for public health, leisure providers and the public sector more generally as it has the potential to provide information about wearers’ lifestyles and how they use services/spaces. These insights can be used to influence decision making and support evidence driven policy. Given the specialist skills required to collate and analyse information this is likely to stimulate new market activity in this area as well.

4.54 In PwC’s *Sports Survey 2017*, which is undertaken with industry leaders, they found that 60% of respondents believe that the introduction of these devices will have a highly positive impact on professional sport. Industry leaders also reported that it may improve fan engagement with professional sport – one respondent said:

“It’s the next frontier… through wearables, fans can find out what it actually takes to be the athletes they admire”.

4.55 There are also opportunities to develop the next generation of these devices and widen their appeal to a broader market.

4.56 Consumers are also now able to use technology to better understand their quantified self through assessments of things like DNA composition, biomarkers and physiology. The introduction of relatively inexpensive biological assays, particularly around known genetic biomarkers and mutations, is creating a new and exciting industry.

4.57 There are a growing number of companies that can provide inexpensive genetic information directly to consumers to help them understand their risk of major genetic diseases. These tests are being increasingly used in the sport and physical activity sector to help athletes, and increasingly recreational participants, to understand their biological strengths and weaknesses. The example of Mudho in Ipswich below illustrates the role this plays in the sector.

4.58 A recent article by Management Consultants, Arthur D Little argues that we may see a global adoption curve of consumer-driven genetic testing in line with recent technology adoptions such as smartphones. While discussing the industry more generally, rather than about its role in sport and physical activity, they expect:

- 99% decrease in the cost of genetic sequencing as it becomes more mainstream
- Global market to grow from $0.3 billion in 2018 to over $49.6 billion by 2026
- >500 million at-risk patients being able to afford tests

**Muhdo, Ipswich**

Muhdo is a genetic profiling company based in Ipswich. They offer consumers genetic profiling services to help them understand their physiological strengths and weaknesses.

Customers who sign up are provided with a genetic profile alongside tailored nutritional and health advice to help them understand how to build on their strengths, overcome their weaknesses and to improve their physical health and performance.

The company is starting to develop tests related to epigenetics and are hoping to be one of the first in the world to help people understand what diseases they are most prone to and to encourage them to track their internal health and condition over time.

The company currently employs eleven people but will soon be opening a new lab in Los Angeles and have strong growth ambitions. They have staff across a range of high-value disciplines, including genetics, statistics, research, media, marketing and nutrition.

They currently sell directly to consumers but also commonly work with workplaces who are interested in understanding and tracking the health of their staff.

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**New technologies are becoming increasingly prominent across the sector…**

4.59 **Virtual Reality (VR)** and **Augmented Reality (AR)** are becoming increasingly prominent in the Sport and Physical Activity Sectors. There are opportunities for the technology to be developed and adapted to suit different purposes and to exploit the technology for new business opportunities.

- **Virtual Reality** immerses users in a fully artificial digital environment and often requires a headset.
- **Augmented Reality** overlays virtual objects on a real-world environment typically via a device like a smartphone or tablet.

4.60 VR is being increasingly used to improve athletic performance at professional levels. Several sports teams in the USA and Europe are using the technology to improve the efficiency of their training sessions through the use of VR/AR glasses. Game scenarios can be recreated allowing teams to analyse matches or prepare via visual training.

4.61 VR also has the potential to revolutionise the fan experience as people will be able to visually experience being in a stadium from anywhere in the world through a VR headset. At the Telegraph Business Sport 2017 conference, Aston Villa CEO Keith Wyness asserted that football clubs will soon be able to sell virtual reality season tickets in China to replicate the match day experience across the world.

4.62 In their *Sport Survey 2017*, PwC suggest that the next step for VR is to allow fans to have a fully immersive experience:

>“Having a look at the catacombs of the stadium or changing rooms before the game starts, or even experiencing the event from the athletes’ vantage points, can enhance their experience massively. According to Steve Hellmuth, the NBA’s VP of Media Operations and Technology we
are five to six years away from a VR experience that makes use of enough data to enable users to sit where they want to inside the stadium”.

4.63 Away from professional sport, VR presents opportunities for the health and fitness sectors through **immersive fitness**. At the moment this is particularly relevant for boutique studios whose success depends in part on providing unique and exciting fitness experiences to attract and retain customers. The key challenge to bring VR to the mass sport and physical activity market is its cost – while it is now more than a niche market, prices will need to fall to integrate better with a wider group.

- **Immersive fitness** classes focus on more than just physical activity – they use audio and visual stimulants to help motivate participants and increase enjoyment.

4.64 As detailed in the box below, UK Active argue that further opportunities are likely to come from outside the Sport and Physical Activity sectors.

- In the summer of 2016 the **Pokemon Go** app became popular across the world. It used AR technology to allow users to find Pokemon characters hidden in the real world. This technology-led game attracted a new consumer segment to build mild physical activity into their lives. While the longevity of these impacts has been questioned, it demonstrates the potential for using technology to promote activity. More apps like this (e.g. sport) may emerge and there have been talks of a Harry Potter themed version coming out in the future.

**Technology is influencing sport consumption and participation…**

4.65 Live television viewership is in decline which is having significant impacts for the sports sector. For example, over the last six years the number of subscriptions to ESPN has fallen from 100 million to 88 million. Similarly, live viewings of Premier League matches fell by 14% in 2016/17 compared to the preceding season.

4.66 This is partially linked to the rise of on demand platforms such as Netflix and Amazon Prime. These platforms continue to grow in popularity and are likely to present significant opportunities and threats for the sports market in the future. It is also linked to the rise in media consumption via mobile devices.

4.67 Such change has led to the emergence of new activities such as **eSports**.

- **eSports** are a form of competition which involves video games. eSports typically take the form of organised, multiplayer video game competitions, often between professional players.

4.68 Over the last few years, eSports competitions have emerged and grown. Large organisations like Formula 1 and Ligue 1 have set up leagues and professional sporting clubs such as Shalke 04 have hired players to compete on behalf of them. It has become particularly popular among young audiences and it is gaining recognition in the sporting world.

4.69 According to Newzoo, a leading provider of eSports market intelligence, eSports revenues are likely to reach $1.2 billion by 2020. This is due to growth in viewership over the last few years in line with the expansion of online streaming. While such activity does not promote physical activity, it represents an economic opportunity because it is starting to formalise and new structures, competitions and leagues are being developed.
There are a range of other relevant growth areas...

4.70 There are a range of other opportunities that are emerging in the Sport and Physical Activity sectors.

4.71 One is the sports nutrition market which has experienced significant growth in recent years.

4.72 According to Zion Market Research, it accounted for $28.37 billion in the global market in 2016 and is expected to reach $45.27 billion by 2020. The growth in the market is primarily attributed to a shift in consumption from bodybuilders and athletes toward lifestyle users. The sports food and drink segments dominate, with a reported market share of 81% in 2016. The sport food segment is expected to grow most rapidly and therefore represents the greatest opportunity.

4.73 Another is the sports equipment and sportswear markets. Rapid advances in technology are helping to increase user performance, safety and comfort and are therefore receiving much investment. One example is the use of biomimetics, which is the application of principles from engineering, chemistry and biology to the synthesis of materials, for athletes. This process is helping manufacturers to create specialist materials, including those that increase the adhesive strength of an athlete when in motion. This is useful for the manufacturer of skid-free shoes that increase grip strength in climbing shoes.

4.74 Other opportunities include the emergence of new sports (e.g. parkour) and the growing prominence of social media.

Opportunities and Regional Priorities

4.75 These future growth sectors, alongside the new venue and sporting event opportunities, align with several strategic priorities of the New Anglia LEP as set out in the table below. When this is set alongside the fact that the sector is the most specialised and fastest growing in the county, it is clear that the LEP and County Council should view the sector as important and as part of future thinking even if it is not explicitly referenced in official documentation. It is also worth noting that many of these opportunities are likely to benefit a number of the LEP’s priority places, including Ipswich and the East-West Corridor.

<table>
<thead>
<tr>
<th>Priority</th>
<th>Relationship to Sport and Physical Activity Sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>Life sciences and biotech</td>
<td>Genetic profiling and data self</td>
</tr>
<tr>
<td>Technology and digital creative</td>
<td>Wearable devices, augmented reality, virtual reality</td>
</tr>
<tr>
<td>Visitor economy</td>
<td>Sporting events (e.g. Ironman, fully-accessible sporting events, multi-sport coastal event) and new sporting venue</td>
</tr>
<tr>
<td>Construction and development</td>
<td>New sporting venue and significant upgrades to existing leisure facilities (e.g. in Deben and Felixstowe)</td>
</tr>
<tr>
<td>Advanced agriculture, food and drink</td>
<td>Sports nutrition</td>
</tr>
<tr>
<td>Advanced manufacturing and engineering</td>
<td>Biomimetics and equipment manufacturing</td>
</tr>
</tbody>
</table>
5. **SWOT Assessment**

5.1 This piece of work has demonstrated that the Sport and Physical Activity sector in Suffolk has a range of strengths, weaknesses, opportunities and threats. Some of the defining factors are displayed in the analysis overleaf.
### Table 5.1 Sport and Physical Activity Sectors SWOT Analysis

#### 5 Defining Strengths

1. **Employment** has grown at a faster rate than for other sectors in Suffolk
2. Highest performing sector in Suffolk in terms of **specialisation** and growth
3. **Employment** in all **sub-sectors** has grown since 2011
4. There is much **supporting infrastructure** across Suffolk (including leisure centres, private fitness centres, alternative sporting facilities, events and natural assets)
5. Suffolk has a **mixed skills base** which suits the diverse nature of the sector

#### 5 Defining Weaknesses

1. Makes up a **small proportion** of the **overall economy**
2. The number of **businesses** associated with some **sub-sectors** has not grown since 2012 and has fallen for one
3. Most **employment** is concentrated in a **small number of districts** (Forest Heath, Ipswich and Suffolk Coastal)
4. There are a range of **skills gaps** that need to be addressed for continued growth
5. **Rural character and relatively slow connectivity** may **limit inward investment** but works well in attracting certain types of events and activity (e.g. Ironman)

#### 5 Defining Opportunities

1. Continuing the drive toward **increasing participation** could have positive impacts for **productivity** and spending on health and social care
2. Range of additional **sporting events** Suffolk could host to generate additional income and support the visitor economy
3. Opportunity to build a **new large-scale sporting venue** in the county which could deliver a range of economic benefits
4. Several **future growth markets** that could be developed to help support the development of the sector
5. **Other pieces of work** related to the economic status of the sector are being undertaken and provide an opportunity to further support growth (e.g. Suffolk’s Sports Workforce Development Strategy)

#### 5 Defining Threats

1. Ageing **leisure facility stock** across the county
2. Continued increases in **obesity and physical inactivity** at the national scale
3. **Local government funding cuts** which are impacting and will continue to impact on funding for leisure facilities and Public Health
4. Falling relative spend on **education and skills**
5. **Curriculum changes** reducing focus on non-traditional subjects at all levels
6. Recommendations

6.1 As Sport and Physical Activity is Suffolk’s highest performing sector in terms of specialisation and growth, it makes sense to support and accelerate its positive trajectory. Work should attempt to capitalise on the sector’s strengths and opportunities.

6.2 Interventions will be most effective if led and driven by a range of different stakeholders from across the county. While Suffolk County Council and the Most Active County partnership have key facilitative and catalytic roles to play, growth and change will require buy-in and ownership from partners.

6.3 Following consultation with stakeholders a broad set of recommendations have been put together to guide future activity. The following recommendation groupings have been identified to structure them:

1) Infrastructure
2) People, participation and productivity
3) Enterprise

Some initial recommendations are set out in Appendix A, alongside a consideration of which stakeholders should be involved, who the lead organisation could be and indicative timescales for each.

6.4 Suffolk County Council will firstly need to dedicate some resources to drive forward the recommendations and to help shape what is required. This would benefit from the co-creation of short pro-formas setting out what each recommendation is as well as its objectives, activities, timescales, outputs, measures of success, risks and resources. Recommendations should become individual or multiple projects in their own right with associated project plans and management systems.

6.5 Once project leads and recommendations have been agreed, consideration should be given to the most appropriate governance structure. To avoid unnecessary duplication, we suggest this work should feed into the existing Most Active County Partnership governance arrangements. These have recently been refreshed to reflect the outcomes of the Government’s Sporting Future strategy, Sport England’s Toward an Active Nation strategy and Suffolk’s Physical Activity Needs Assessment. As Figure 6.1 below shows, it includes a Strategic Group and three thematic Delivery Groups.

6.6 The Most Active County Partnership Strategic Group has clear terms of reference and is well placed to take overall responsibility for co-ordinating the recommendations. Membership of the group, however, should be reviewed to ensure appropriate stakeholders and project leads are represented. Key partners include representatives from: Suffolk County Council (Public Health, Economic Development, Policy and Spatial Planning), the University of Suffolk, Suffolk Growth Programme Board, businesses, FE providers, district councils, New Anglia LEP, Chamber of Commerce, major leisure providers and Destination Management Organisations etc.

6.7 The three thematic Delivery Groups focus on:

(i) Physical and Mental Wellbeing;
(ii) Behaviour Change, Communication and Information;
Environment, Economic Development and Infrastructure.

As Figure 6.1 demonstrates, each of these groups should take responsibility for the different recommendation groupings identified for this piece of work.

Figure 6.1 Relationship between Most Active County Strategic Group and Delivery Groups and the recommendation groups emerging from this work

Measuring Success

The Most Active County Strategic Group will need to assess change over time in order to track progress and demonstrate impact. This will need to be reviewed at least every two years. Project leads should be encouraged to monitor key outputs. The table below provides an overview of possible metrics that could be considered for each theme. These measures will need to be agreed and adapted on a project-by-project basis.
# Table 6.1 Measures of Success

<table>
<thead>
<tr>
<th>Infrastructure</th>
<th>People, Participation and Productivity</th>
<th>Enterprise</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of new/improved sports facilities</td>
<td>Participation levels over time</td>
<td>Number/growth of businesses in the sector</td>
</tr>
<tr>
<td>Number of new major sporting events</td>
<td>Number of apprenticeships in the sector over time</td>
<td>Number/growth of employees in the sector</td>
</tr>
<tr>
<td>Economic impact of all new sporting events over time</td>
<td>Sickness levels over time</td>
<td>Size of Sport and Physical Activity business network over time</td>
</tr>
<tr>
<td>Income leveraged for the sector from planning over time</td>
<td>Number of businesses signed up to healthy business charter over time</td>
<td>Number of business network events held over time and attendance</td>
</tr>
<tr>
<td></td>
<td>Number of new FE/HE courses related to Sport and Physical Activity sectors</td>
<td>Number of businesses contacted as part of inward investment drive</td>
</tr>
</tbody>
</table>
## Appendix A - Recommendations

### Suffolk Sport and Physical Activity Economic Growth Recommendations

<table>
<thead>
<tr>
<th>Theme</th>
<th>Recommendation</th>
<th>Stakeholders</th>
<th>Lead/s</th>
<th>Timescale</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Infrastructure</strong></td>
<td>1. <strong>Continue to grow the established Suffolk Facilities Framework Group focused on a new major sporting venue in Suffolk.</strong> The next steps should involve inviting the LEP to join, continuing existing positive discussions and investigating whether any joint funding can be secured for a formal feasibility study and options assessment.</td>
<td>Suffolk County Council (various departments), New Anglia LEP, University of Suffolk, Ipswich Borough Council, Suffolk Sport, Growth Infrastructure Board</td>
<td>Suffolk Sport</td>
<td>Medium-Long</td>
</tr>
<tr>
<td></td>
<td>2. <strong>Use New Anglia LEP’s Visitor Economy and Cultural Sector Group to explore opportunities for more events and start to develop a co-ordinated cross-county major events plan</strong> – this will require early engagement with event operators to understand their appetite to host events in the county. It will be important to create a medium and long-term pipeline of events so stakeholders can build them into their business planning. A key part of this will involve exploring whether the Suffolk Growth Programme Board’s Growth Portfolio Holder Group would consider focusing on sporting events as part of its existing tourism and leisure work. This would open up opportunities to identify which local authorities may be willing to co-fund and host events. Economic and financial impact assessments may need to be completed to leverage funding and convince operators to host events in the region. It will also require engagement with the county’s Destination Management Organisations (e.g. Suffolk Coast DMO) and Business Improvement Districts (e.g. Lowestoft Vision) to understand their appetite to support events. Some have previously encouraged and helped organise major sporting events so they could be an important resource for the group.</td>
<td>Suffolk County Council (Public Health and Economic Development), New Anglia LEP, Suffolk Sport, Suffolk Growth Programme Board and representatives from across the county</td>
<td>New Anglia LEP and Suffolk Growth Programme Board</td>
<td>Medium</td>
</tr>
<tr>
<td></td>
<td>3. <strong>Engage with planning teams</strong> as part of existing work across the county to understand how mechanisms like CIL, s106 etc. could be better utilised to support the development of the Sport and Physical Activity sectors. It will valuable to understand where/how local authorities in Suffolk have used the planning system to encourage the development of new sports and leisure facilities.</td>
<td>Suffolk County Council (various departments), Suffolk Sport and other relevant districts</td>
<td>Suffolk Sport</td>
<td>Long</td>
</tr>
<tr>
<td><strong>People and Productivity</strong></td>
<td>4. <strong>Continue to deliver and support the Most Active County partnership and other initiatives aimed at increasing participation. As part of the on-going review of the partnership, ensure that existing and new work has a clear focus on</strong></td>
<td>Suffolk County Council (Public Health), Suffolk Sport and key partners from within the sector</td>
<td>Suffolk County Council Public Health</td>
<td>Short</td>
</tr>
</tbody>
</table>
increasing productivity, reducing sickness days and supporting the growth of the Sport and Physical Activity Sector.

<table>
<thead>
<tr>
<th>5.</th>
<th>Assess workplace health and sickness in the county and explore initiatives/campaigns that could be adopted and promoted to encourage participation and improve health within the workforce. Programmes and initiatives that have a demonstrable impact on productivity should be prioritised.</th>
<th>Suffolk County Council (Public Health), Most Active County, University of Suffolk and Suffolk Sport</th>
<th>Suffolk County Council Public Health</th>
<th>Medium to long</th>
</tr>
</thead>
</table>

| 6. | Use the Most Active County framework to identify ways to support the skills needs of the sector and help people into the industry. This would require more research into the key gaps in the skills profile and should consider the demand for additional courses. This would involve tapping into this work, assessing the results of Suffolk Sport’s Workforce Development Strategy and undertaking more consultation. The group could then consider how to tap into existing:
  - Apprenticeship programmes
  - Internship programmes
  - FE/HE institutions (University of Suffolk)
  - Relevant bodies (e.g. National Skills Academy for Hospitality and Chartered Institute for the Management of Sport and Physical Activity)

There is also a need to help education institutions to align their offering with employers need to ensure people with the right technical and personal skills enter the sector. | Suffolk County Council (Public Health, Economic Development and Policy), major leisure providers, University of Suffolk, major FE providers etc. | Suffolk Sport and Suffolk County Council Policy Team | Medium |

| Enterprise | Develop an approach to support small, growing and established businesses in the sector to prosper and scale. This would firstly involve establishing a database of relevant businesses across the county and then developing an approach to signpost them to existing services and activities they can tap into. This could involve:
  - Creation of online and offline tools explaining what support exists and how to access it (e.g. the Growth Hub)
  - Identify and signpost businesses to relevant workspaces (e.g. incubator or accelerator hubs)
  - Development of a webpage specifically focused on the needs of the sector (this could be hosted on an existing website)
  - Inviting businesses to join a business network focused on the Sport and Physical Activity sectors (see next recommendation)

Stakeholders should also consider how to adapt their existing business support services to better meet the needs of the sector. | Suffolk Chamber of Commerce, Suffolk County Council (Economic Development and Public Health), Growth Hub, New Anglia LEP, University of Suffolk, relevant boroughs etc. | Suffolk Chamber of Commerce | Short to medium |
8. **Convene a sport and physical activity business network.** This would involve identifying relevant businesses and inviting them to join a network using the database discussed in the previous recommendation. The network could involve regular newsletters and biannual events. These could be new events (e.g., meet the buyer) or could involve exploiting existing networks (e.g., Tech East) to hold events that are relevant to the sector. The key is to build relationships within the sector and increase its profile across the county. The network should also identify key emerging areas across the growth, economic development and regeneration agendas that the sector should be trying to influence.

   - Suffolk Chamber of Commerce, Suffolk County Council (Economic Development and Public Health), Growth Hub, New Anglia LEP, University of Suffolk, relevant boroughs etc.
   - Suffolk Chamber of Commerce
   - Short to medium

9. **Working with partners like Invest in Suffolk, develop an inward investment approach for the Sport and Physical Activity sectors in Suffolk.** This could involve:
   - Identifying businesses in the sector that are growing and have a low or no profile in Suffolk
   - Identifying locations that would be appealing to businesses
   - Creation of marketing materials to demonstrate the value of the sector in Suffolk and the major opportunity areas – assess the value in promoting a Sport and Physical Activity cluster in Ipswich focused on future drivers of growth
   - Liaising with the LEP on their emerging inward investment strategy and exploring how the Sport and Physical Activity sector can link in
   - Approaching businesses in the sector in a co-ordinated way to discuss opportunities and their requirements

   - Suffolk County Council (Economic Development and Public Health), Invest in Suffolk, New Anglia LEP, New Anglia Growth Hub, relevant boroughs etc.
   - Suffolk Chamber of Commerce
   - Medium to long